DOCUMENT RESUME

ED 197 125 CE 027 734

AUTHOR	Slaaten, Doris
TITLE	Manual for North Dakota Vocational Office Education Coordinators. First Revision.
INSTITUTION	Minot State Coll., N. Dak.: North Dakota State Board for Vocational Education, Bismarck.
PUB DATE	Jun 80
NOTE	437p.
EDRS PRICE	MF01/PC18 Plus Postage.
DESCRIPTORS	Business Education: Check Lists: *Cooperative Education: Curriculum: Curriculum Development: Educational Objectives: *Instructor Coordinators: Learning Activities: *Office Occupations Education: *Program Development: Resources: Secondary Education: Selective Admission: Vocational Education: *Work Experience Programs
IDENTIFIERS	*Cooperative Office Education: *North Dakota

ABSTRACT

This manual, revised and updated from the 1971 version, is designed to provide beginning coordinators with a usable handbook to develop new programs in cooperative office education. After statements on development of the manual and instructions in its use, the book is divided into phases, each with educational objectives, checklists, and suggested learning activities. The phases examined are the following: development of program goals, development and review of new and on-going programs, development of criteria for selection of student learners, selection of student learners, compilations of students' personal and educational data, utilization of guidance department in selection of student learners, development of criteria for selection of training stations, selection of training stations, interviews with firm representatives, placement of students, public relations, law and the cooperative office education program, coordinating techniques, advisory committees, student organizations, evaluation, job placement, model office simulations, and follow-up of completers/leavers. An appendix contains forms, a description of the General Aptitude Test Battery, definitions of terms, and a bibliography. (KC)

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A MANUAL FOR NORTH DAKOTA VOCATIONAL OFFICE EDUCATION COORDINATORS

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BACKGROUND OF THE PROJECT

Vocational education has gained considerable impetus during the past decade. Since the passage of the Vocational Education Act of 1963 and subsequent amendments, many new programs in vocational education have been established. For the first time, Federal support provided incentives to vocational office education in the form of goal formulation, financial aid, and program assessment. Office Education is now one of the most frequently offered areas of vocational education in the secondary schools.

As vocational office education programs expand in number and scope, it became imperative that appropriate materials be developed to assist those personnel involved in administering and coordinating such programs. The original manuscript was written by Dale Atwood, Chairman of the Division of Business at Minot State College, and Doris A. Slaaten in 1971. This publication is a revision of guidelines for coordinating cooperative office programs which appeared in the original manual.

The selection of coordination topics to be considered for inclusion in the original manual was developed after studying professional literature. Those topics appearing most frequently in the professional literature were selected in the development of a content outline. This preliminary outline was then presented to a selected number of coordinators to solicit their opinions regarding both the content and the organization of the manual. The outline of coordination topics and checklists was then revised.

Specific checklists were then formulated to provide the sequence of activities necessary to accomplish each objective for that checklist. Supplementary aids (identified as Form A, B, etc.) were utilized for each checklist when it was deemed necessary. These forms are the tools which the coordinator will utilize in carring out activities.

The last phase of the original manual was completed and disseminated in 1971. It has been used by Vocational Cooperative Education teachers in North Dakota since that time.

During the academic year of 1979-80 the manual has been revised and updated. New phases such as simulation activities and labor laws have been added.

A committee of selected Coordinators, COE teachers and the State Supervisor of Office Education (see Acknowledgements) made recommended changes. They also approved materials which have been added.

The manual was finally reviewed by Mr. Jerry Lydeen, State Supervisor of Office Education, who offered some valuable suggestions. All suggestions were considered and the final draft of the manual prepared.

ACKNOWLEDGEMENTS

This publication was the result of invaluable cooperation of many people. Dr. Larry Barnhard provided valuable assistance in the planning of the project. Acknowledgements must also be made to Mr. Jerry Lydeen, State Supervisor of Office Education, who assisted in planning and evaluation of the project, and to the following people who took time to evaluate the manual in its rough draft form:

Mrs. Marlys Brown, Sheyenne Valley Vocational Center, Cooperstown, ND
Mr. Marvin Dietz, Business Dept., Bismarck Junior College, Bismarck, ND
Dr. Dorothy Grovom, University of North Dakota, Grand Forks, ND
Mr. Arthur Jorgenson, New Salem High School, New Salem, ND
Miss Janis Paulson, Vocational Office Ed., Mott Public Schools, Mott, ND

Thanks are also given to Mr. Douglas R. Oglesby, Superintendent of Enderlin Public Schools; Mr. Dale A. Ekstrom, Coordinator, Scranton Public School, District No. 33; Miss Harriet Shurr, Coordinator, Jamestown High School; Mrs. Arlene Walz, Coordinator, Bismarck High School; and Mrs. Doris Stroh, Coordinator, Lisbon; for materials which were utilized in the manual.

Miss Zona Grubb was Student Assistant to the director on the revision of the project. Appreciation is extended to all other people who offered encouragement when the manual was under development.

Dorothy Caroline, a senior in Cooperative Office Education, developed Phase XV - Incorporating Model Office Simulations Into the Business Curriculum, as a class project. Brochures developed by Mary Hedberg and Roberta Talcott, students in Business 423 class, have been utilized in the manual.

UTILIZATION OF THE MANUAL

This procedures manual is developed primarily to serve the office education coordinator in two ways:

1. To provide a reference handbook for the beginning coordinator in developing a new program in cooperative office education.
2. To serve as a guide for reviewing and improving existing cooperative office education programs.

The organization of the handbook is deliberately designed to insert into loose-leaf notebooks. This format provides flexibility in utilizing the materials or forms included in the handbook. If a coordinator desires to use any forms included, just remove and duplicate them. In addition, the local coordinators can insert appropriate section materials which are pertinent to the local situation. Another advantage of this format is to provide for the simplified revision of the handbook, allowing sections to be easily deleted, revised, replaced, or new sections added.

Appendix A is a sample supervisors handbook. Appendix B contains samples of training plans. Appendix C is made up of miscellaneous forms and Appendix D gives a description of the General Aptitude Test Battery(GATB).

Checklists are designed to provide a list of activities to achieve a specific objective. The forms which are to be utilized for each checklist are identified at the end of the checklist.

It is not the intent that the handbook is complete, but rather a source of reference. It should be considered a collection of pertinent and significant ideas on the most important professional responsibilities of a coordinator. If it is utilized, revised, and expanded, it will continue to be a worthwhile professional resource.

TABLE OF CONTENTS

Pages

Background of the Project i

Acknowledgements ii

Utilization of the Manual iii

PHASE I DEVELOPMENT OF PROGRAM GOALS

Checklist No. 1 Common Elements in All Cooperative Education Programs 1

- A. Characteristics of Cooperative Education 2
- B. Advantages of Cooperative Education. . 3

Checklist No. 2 Specific Program Objectives 5

- A. Specific Objectives for Cooperative Office Education 6
- B. Checklist to Determine the Need for a COE Program 7

PHASE II DEVELOPMENT AND REVIEW PROCEDURES FOR NEW AND ON-GOING PROGRAMS

Checklist No. 1 Establishment of New Program 8

- A. Student Needs 10
- B. Community Business Survey 11
- C. Advisory Committee Composition and Operation 13
- D. Calendar of Events 14

Checklist No. 2 Review of On-Going Programs. 17

- A. Student Rating Sheet 18
- B. Report on Related Class Instruction. . 20

PHASE III DEVELOPMENT OF CRITERIA FOR SELECTION OF STUDENT-LEARNERS

Checklist No. 1 Establishment of Criteria 21

- A. Criteria Concerning Educational Requirements in the Selection of Student-Learners 22
- B. Criteria for Selection of Students for Office Education Part-Time Training Program 23

TABLE OF CONTENTS CONTINUED

Pages

PHASE IV SELECTION OF STUDENT-LEARNERS

Checklist No. 1 Orientation and Survey of Student Body . . 24

A. Outline of Orientation Speech to Student Body 25
B_1 Student Interest Survey 26
B_2 Student Survey Form 27

Checklist No. 2 Compilation of Student's Personal and Educational Data 28

A. Students Who Should be Considered for Selection 29
B. Application Blank - Applicable to All Vocational Programs 30
C. Sample Letter to Parents of Prospective COE Students 32

Checklist No. 3 Utilization of Guidance Department in Selection of Student-Learners 33

Checklist No. 4 Interviews with Students by Coordinator. . 34

A. Reasons a Student Might Have Requested Enrollment 35
B. Conducting the Initial Interview . . . 36

Checklist No. 5 Orientation of Parents to Vocational Office Education 37

Checklist No. 6 Evaluation of Students 38

A. Final Interview 39

PHASE V DEVELOPMENT OF CRITERIA FOR SELECTION OF TRAINING STATIONS

Checklist No. 1 Criteria for Selection of Training Stations 40

A. Criteria for Selection of Training Stations 41
B. Dictionary of Occupational Titles Listings 42

PHASE VI SELECTION OF TRAINING STATIONS

Checklist No. 1 Interviews with Firm Representatives . . . 46

A. Sources Which the Coordinator May Use in Locating Training Stations. . . 47

TABLE OF CONTENTS CONTINUED

Pages

PHASE VI Checklist No. 1 Interviews with Firm Representatives. . . . 46

B. Introductory Letter 47
C. Interview Procedure 48
D_1 Business Firm Information Form 49
D_2 Training Station Evaluation Checksheet 50
E. Role of School, Cooperating Firm, and Student-Learner in a Cooperative Office Education Program 52
F. Training Station Assessment 53

Checklist No. 2 Selection of Cooperating Firms. 54

PHASE VII PLACEMENT OF STUDENT

Checklist No. 1 Student Selection of Career Objective . . . 55

A. A Self-Appraisal Unit 56

Checklist No. 2 Preparation for Employment Interviews . . . 62

A. Your Do's and Don'ts. 63
B. Role Playing. 64
C. Interviewer's Evaluation Form 66
D. Procedure for Completion of Application Form. 67
E. Introductory Letter 68

Checklist No. 3 Placement of Students at Cooperative Training Stations 69

Checklist No. 4 Development of Training Plan and Memorandum 70

PHASE VIII PUBLIC RELATIONS

Checklist No. 1 Nature and Role of a Public Relations and Promotional Program 71

A. Nature and Role of a Public Relations and Promotional Program 72

Checklist No. 2 Development of Specific Public Relations and Promotional Activities. 73

A. A List of Specific Promotional Activities. 74
B. Utilization of News Releases. 75
(1) Preparation of the News Release. . 76
(2) Sample News Release. 77

PHASE VIII Checklist No. 2 Development of Specific Public Relations and Promotional Activities 73

C. Promotional Speech Presentation 78
D. Illustrated Bulletin Board 81
  (1) Illustrated Bulletin Board 82
E. Development of a Promotional Brochure . . 83
  (1) Six Page Fold-Out Brochure 84
  (2) Illustrated Brochures 85
F. Certificate of Participation in COE Program 89

PHASE IX LAW AND THE COE PROGRAM

Checklist No. 1 Responsibility of the Teacher Coordinator . . 90

A. Teacher Coordinator's Responsibility in Complying with the Law 91
B. Providing Equality 92
C. Laws Affecting Employment of Student-Learner (Federal) 94
D. Student-Learner's Certificate Application Form 98
E. North Dakota Minimum Wage Orders No. 7 . . 99

Checklist No. 2 Targeted Jobs Tax Credit 105

A. Targeted Jobs Tax Credit 106
B. Certification of Youth Participating in a Qualified Cooperative Education Program 109
C. Sources of Information 111

PHASE X COORDINATION TECHNIQUES

Checklist No. 1 Establishment of a Supervisor Development Program 112

A. What is a Supervisor Development Program 113
B. Why Have a Supervisor Development Program 113
C. Procedure for Organization of Orientation Meeting for Supervisor Development Program 114
D. Responsibilities of Coordinator and Supervisor in a Cooperative On-The-Job Training Program 115
E. Tentative Supervisor Training Calendar . . 117

Checklist No. 2 Orientation of Student-Learner to Cooperative Training Firm 119

A. Adjustment of Student-Learner to a Job Environment 120

TABLE OF CONTENTS CONTINUED Pages

PHASE X Checklist No. 2 Orientation of Student-Learner to Cooperative Training Firm 119

B. Development of Orientation Procedures. . 121

Checklist No. 3 Coordination Through Visitations to Training Firm 122

A. Purpose and Frequency of On-Site Visitations 123
B. Techniques in Observation. 126
C. Summary Form -- On-Site Visitation . . . 127

Checklist No. 4 Conference With Job Supervisor 128

A. Job Supervisor Interviews 129
B. Suggested Guidelines for Supervision Interviews 130

Checklist No. 5 Conference With Student-Learner 131

A. Counseling With Students and Parents . . 132
B. Adjusting to Problem Situations. 133

Checklist No. 6 Utilization of Three-Way Conferences: Coordinator, Supervisor, and Student-Learner 134

A. The Purpose and Frequency of the Three-Way Conference 135
B. Conducting the Three-Way Conference. . . 137
C. Evaluation of the Three-Way Conference . 138

PHASE XI ADVISORY COMMITTEE

Checklist No. 1 The Nature and Functions of an Advisory Committee 139

A. The Nature and Role of an Advisory Committee in Office Education 140
B. Functions of Effective Advisory Committees 142
C. Sources of Information About Advisory Committees 143
D. Sample Brochures 145
E. Planning Sheet for Advisory Committees . 149
F. Suggested Agenda for First and Second Meetings 150
G. Certificate of Appreciation for Advisory Committee Member 151

TABLE OF CONTENTS CONTINUED   Pages

PHASE XII STUDENT ORGANIZATIONS

Checklist No. 1 Nature and Functions of Student Organizations for Office Education 152

- A. Nature and Functions of Student Organizations. 153
- B. Planning Sheet for Student Organizations 156

Checklist No. 2 Organization of a Student Club 157

- A. How to Organize a Local Chapter 158
- B. What Goes Into a Club's By-Laws 160
- C. By-Laws Checklist 161
- D. Suggested Club Activities. 162
- E. Evaluate Your Student Organization . . . 165

Checklist No. 3 Development of a Yearly Student Club Calendar 168

- A. Long-Range Plan for Student Club 169
- B. Illustration of Yearly Student Club Calendar 170

PHASE XIII EVALUATION

Checklist No. 1 Evaluation of Student on the Job 173

- A. Purpose of Student-Learner Evaluation. . 174
- B. Suggested Criteria for Student-Learner Evaluation 174
- C. Student-Learner Self-Evaluation Form . . 175
- D_1 Job Rating Sheet 176
- D_2 Job Rating Sheet 177
- E. Student-Learner Record 178

Checklist No. 2 Evaluation of the Student in the Related Class 180

- A. Teacher Rating Record of Course Competency 181

Checklist No. 3 Evaluation of the Training Firm 182

- A. Purposes and Methods of Evaluating Training Firms 183
- B. Criteria for Evaluating Training Firms . 184

TABLE OF CONTENTS CONTINUED

Pages

PHASE XIII Checklist No. 4 Evaluation of the Cooperative Program 185

A. Checklist for Evaluating Cooperative Programs in Office Education. 186

Checklist No. 5 Coordinator's Self-Evaluation 189

A. Purposes and Process of Self-Evaluation . 190
B. Criteria in Self-Evaluation of Office Education Coordinator 192
C. Tasks of Office Education Coordinator . . 193
D. Student Evaluation of Coordinator 194

PHASE XIV JOB PLACEMENT OF COMPLETER-LEARNERS

Checklist No. 1 The Role of the Teacher Coordinator in Placement Activities. 195

A. The Role of the Office Education Coordinator in Assisting the School Administration and Guidance Counselor in Placement Activities 196
B. Specific Activities for the Teacher Coordinator in Job Placement. 198
C. Personal Record Card 199

Checklist No. 2 Utilization of Services Offered by the North Dakota Job Service 200

A. List of Job Service Offices in North Dakota. 201

PHASE XV INCORPORATING MODEL OFFICE SIMULATIONS INTO THE BUSINESS CURRICULUM

Checklist No. 1 Defining and Selecting Model Office Simulations 202

A. Criteria for Selection of Model Office Simulations 203
B. Selected Model Office Simulations 205
C. Simulated Office Package Evaluation Form. 208

Checklist No. 2 Developing Model Office Simulations 210

A. Steps in Developing a Model Office Simulations 211

Checklist No. 3 Evaluating Model Office Simulations 213

A. Product and Process Evaluation. 214

TABLE OF CONTENTS CONTINUED Pages

PHASE XV Checklist No. 3 Evaluating Model Office Simulations 213
B. Simulation Process Evaluation Form. . . 217
C. Simulation Process Evaluation Form For Employee Use. 219

PHASE XVI FOLLOW-UP OF COMPLETER-LEARNERS

Checklist No. 1 Year End Follow-Up 220
Checklist No. 2 In-Depth Follow-Up 221
A. Follow-Up Study Questions for Cooperative Business Education Programs . . . 222
B. Suggested Outline for Analyzing the Results of Follow-Up Study 225
C. Student Follow-Up Survey 227
  (1) Cover Letter for Student Follow-Up 229
  (2) Reminder Letter for Student Follow-Up 230
  (3) Reminder Card for Student Follow-Up 230
D. Employer Follow-Up Form 231
  (1) Cover Letter for Employer Follow-Up 232
  (2) Reminder Letter for Employer Follow-Up 233

APPENDIX A COOPERATIVE OFFICE EDUCATION TRAINING SUPERVISOR HANDBOOK

The COE Program 235
The COE Teacher/Coordinator 238
The COE Training Station. 241
A. How Selected. 242
B. Responsibilities. 243
C. Advantages. 244
The COE Student 245
Supervision 247
A. Orientation 248
B. How To Supervise Student-Learner. . . . 249
C. What to Teach 250
Forms and Agreements. 251
A. Office Occupations Program Agreement 253

TABLE OF CONTENTS CONTINUED

Pages

APPENDIX A Forms and Agreements. 251

B. Memorandum of Training Plan 255
C. Step-by-Step Training Plan. 256
D. Occupational Outline and Training Plan. 261
E. COE Work Experience Job Rating Sheet 263
F. Evaluation of Student-Learner 264
G. Student-Learner Weekly Report 267
H. Progress Report 268
I. Checklist for Evaluating Cooperative Programs. 269

Glossary. 273

APPENDIX B JOB DESCRIPTIONS AND INDIVIDUALIZED TRAINING PLANS

Bookkeeper (Accounting Clerk) 275

Cashier 285

Bank Clerk (Teller) 287

File Clerk 290

General Office Clerk. 302

Transcribing Machine Operator 313

Mail Clerk 315

Receptionist. 321

Secretary 324

Legal Secretary 336

Medical Secretary 347

Stenographer. 357

Clerk-Typist. 359

Key-Punch Operator. 366

APPENDIX C MISCELLANEOUS FORMS

Coordination Visit Report 368

14

TABLE OF CONTENTS CONTINUED Pages

APPENDIX C MISCELLANEOUS FORMS

Weekly Coordination Schedule. 369

Analysis of Recruitment Interview 370

Teacher Recommendation. 371

Sample Introduction Card. 372

Summary Sheet/Calendar of Coordination Visits. 373

Attendance and Work Report. 374

Certification of Youth Participating in a Qualified Cooperative Education Program . 375

Permission for Release of Confidential Information 377

Consent for Release of Confidential Information 378

Release of Information. 379

Cooperative Office Education Application for Admittance. 380

Guidance Interview Form 382

APPENDIX D DESCRIPTION OF THE GENERAL APTITUDE TEST BATTERY

Description of GATB 383

GATB Uses in Grades Nine and Ten. 384

Individual Testing. 385

Individual Counseling and Placement 385

Definition of Terms 386

Bibliography 391

PHASE I

DEVELOPMENT OF PROGRAM GOALS

PAGE

1. Common Elements in All Cooperative Education Programs 1
   A. Characteristics of Cooperative Education 2
   B. Advantages of Cooperative Education................. 3

2. Specific Program Objectives 5
   A. Specific Objectives for Cooperative Office Education .. 6
   B. Checklist to Determine the Need for a COE Program ... 7

PHASE 1 - DEVELOPMENT OF PROGRAM GOALS

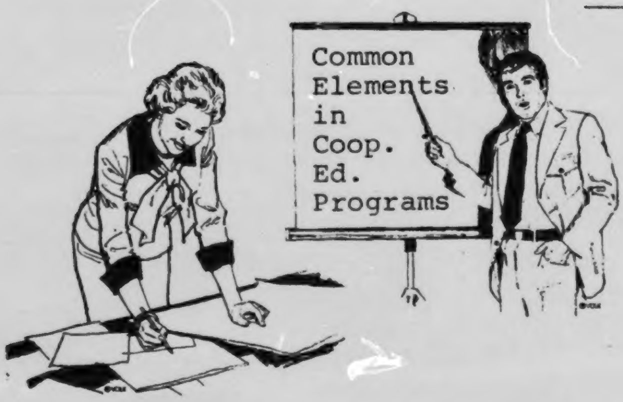
Checklist No. 1 - Common Elements in All Cooperative Education Programs

Objective: To develop the concept that a great commonality exists in vocational cooperative programs.

Suggested Activities:

_____ 1. Study Form A, which lists the characteristics of Cooperative Education.

_____ 2. Study Form B, which lists the advantages of Cooperative Education to the student, school, employer, and community.



Forms:

A - Characteristics of Cooperative Education

B - Advantages of Cooperative Education

Phase 1 - Checklist No. 1 - Form A

Form A -CHARACTERISTICS OF COOPERATIVE EDUCATION

The following characteristics are essential to a cooperative education program:

1. Functioning advisory committee
2. Competent teacher-coordinator
3. Adequate classroom facilities
4. Adequate time for coordination
5. Instructional program
6. Student-learners with business career objectives
7. Selected training stations
8. On-job supervision
9. Individualized training plans

Phase 1 - Checklist No. 1 - Form B

Form B - ADVANTAGES OF COOPERATIVE EDUCATION

TO THE STUDENT:

1. Develops through direct on-the-job training and understanding of employment opportunities and responsibilities.
2. Provides for the student through an individualized training plan, a realistic learning situation.
3. Provides basic information about business, industry, and agribusiness needed for intelligent career choices.
4. Develops attitudes and work habits necessary for job competency.
5. Develops a better understanding of human factors in business and industry through working with other employees.
6. Provides income while learning employment skills. (Earn while you learn.)
7. Provides dual learning environment---school life and employment. Classroom instruction which is correlated with on-the-job activities.

TO THE SCHOOL:

1. Provides a learning laboratory for students without a major expenditure to the school.
2. Unites business, agriculture, industry, and the school in an effort to develop a strong vocational program.
3. Provides the school with social and technical information at a low per capita cost.
4. Provides a practical means of reaching students and holding them in school by clarifying career goals.

TO THE EMPLOYER:

1. Gives the employer the opportunity to help select, instruct, train, and evaluate young workers for effective job performance.
2. Provides for assistance from the school in instructing and counseling the co-op students during the transition and adjustment period from school to work.
3. Provides employers with selected and motivated workers who have chosen a career in keeping with their interests and aptitudes.

Phase 1 - Checklist No. 1 - Form B, Continued

4. Provides for a consistent in-school and on-the-job training with current practices in business, industry, and agriculture.
5. Provides for an opportunity to render an important public service.

TO THE COMMUNITY:

1. Provides a method of introducing students to local employment opportunites.
2. Provides specialized occupational training at a reasonable cost.
3. Provides a means of developing productive citizens for the community.
4. Promotes closer cooperation and understanding between the community and its school.

PHASE I - DEVELOPMENT OF PROGRAM GOALS

Checklist No. 2 - Specific Program Objectives

Objective: To develop realistic specific objectives for the vocational office education program in your school.

Suggested Activities:

_____ 1. Review Forms A and B concerning objectives and needs of the vocational office education program.

_____ 2. Select those specific objectives from Form A which best suits your particular program.

_____ 3. Respond to the guidelines in Form B to determine the need for a COE Program.

Innovative Activities:

_____ 1. Express objectives in terms of student behavioral goals.

_____ 2. Express objectives in terms of specific job competencies.

_____ 3. Orient members of the school administration and guidance department of objectives formulated.

Forms:

A - Specific Objectives for Cooperative Office Education

B - Checklist to Determine the Need for a COE Program

Phase I - Checklist No. 2 - Form A

Form A - SPECIFIC OBJECTIVES FOR COOPERATIVE OFFICE EDUCATION

Specific Objectives:

1. To present, develop, and define the office skills necessary for job competency.
2. To provide a laboratory in which students practice the skills, knowledge, and attitudes learned to make the classroom instruction more meaningful and relevant.
3. To provide an opportunity, through the use of local businesses, for the students to acquire additional skills and knowledge not possible or practical in the classroom.
4. To prepare the students for full-time employment after graduation and to give them a background of training which will contribute to rapid advancement on the job.
5. To develop good work habits and attitudes; to aid in the development of such personality traits as punctuality, dependability, accuracy, tact, adaptability, poise, and a sense of responsibility that makes for efficient work with a minimum of supervision.
6. To guide the students in selecting the particular job most suitable to them in terms of their interests, aptitudes, and their abilities.
7. To provide a situation in which community needs for office employees may be more satisfactorily met.
8. To provide an opportunity for students to make social adjustments and to develop the ability to work cooperatively with co-workers and superiors.
9. To encourage graduates of the high school to become employed and remain in the community.
10. To promote the feelings of self-respect and achievement in students.
11. To emphasize the importance of being able to follow instructions and accept supervision.
12. To encourage good attendance in school and on the job.
13. To stress the importance of being neat, prompt, and dependable.
14. To develop sound concepts of personal money management through experiences gained from wages received from training stations and related instructions.
15. To provide the student with up-to-date information concerning new office equipment and business office procedures.

Phase I - Checklist No. 2 - Form B

CHECKLIST TO DETERMINE THE NEED FOR A COE PROGRAM*

Respond to the following guidelines by placing a check (✓) in the proper space for "yes" or "no" in each situation.

Guidelines	Situation A		Situation B		Situation C	
	YES	NO	YES	NO	YES	NO
1. The results of the community survey indicate support for a COE program.	___	___	___	___	___	___
2. The results of the student survey indicate that qualified students would be available to start the COE program and that there are prospects for future growth.	___	___	___	___	___	___
3. Guildelines for establishing a COE program as set forth by the Program Standards, North Dakota Department for Vocational Education, have been followed.	___	___	___	___	___	___
4. The advisory committee has studied survey results.	___	___	___	___	___	___

For each situation indicate whether the advisory committee should recommend establishment of a COE program by placing a check (✓) in the proper space for "yes" or "no" response.

Situation	Recommend Establishment of COE?		Reasons
A	YES ____	NO ____	
B	YES ____	NO ____	
C	YES ___	NO ____	

---

*Dept. of Education, *A Competency-Based Guide for Organizing and Admin. Cooperative Office Education*, Richmond, VA (June, 1979), p. 2.10.

PHASE II

DEVELOPMENT AND REVIEW PROCEDURES FOR NEW AND ON-GOING PROGRAMS

PAGE

1. Establishment of New Program 8
   - A. Student Needs 10
   - B. Community Business Survey 11
   - C. Advisory Committee Composition and Operation 13
   - D. Calendar of Events 14

2. Review of On-Going Programs 17
   - A. Student Rating Sheet 18
   - B. Report on Related Class Instruction.................. 20

PHASE II - DEVELOPMENT AND REVIEW PROCEDURES FOR NEW AND ON-GOING PROGRAMS

Checklist No. 1 - Establishment of New Program

Objective: To establish an office education program which will prepare students for occupational competence.

Suggested Activities:

_____ 1. Conduct a realistic assessment of student and community needs which can be served by an office education program. This survey can be completed by the office education coordinator or by qualified administrative personnel if no office education coordinator is on the staff. See Form A concerning student needs and Form B, Business Interview Survey Form, prior to conducting this study.

2. Develop and secure administrative approval of an overall program plan consisting of:

_____ a. Program objectives, student-learner recruitment and selection criteria and procedures. (See Phases I, III, and IV)

_____ b. Training station selection criteria and procedures. (See Phases V and VI)

_____ c. Class scheduling of related classroom instruction. (Two-hour block recommended)

_____ d. High School credit allocation for the two phases (related class and on-the-job training) of the program.

_____ e. Public relations and promotional activities. (See Phase VIII)

_____ 3. Develop an office education curriculum which will meet state requirements.

_____ 4. Carefully recruit and select training stations. (See Phases V and VI)

_____ 5. Appoint an advisory committee. See Form C. (This activity may be delayed until program is established)

_____ 6. Recruit and select student-learners. (See Phases III and IV)

_____ 7. Have student-learners carefully select career objectives.

_____ 8. Prepare Step-by-Step Training Plan and secure acceptance by cooperating firms involved.

Phase II - Checklist No. 1 - Continued

Suggested Activities:

_____ 9. Keep systematic and complete program records of information on students, training stations, and follow-up studies of graduates. Develop an efficient filing system of the files prepared for each student, one restricted to confidential material.

_____ 10. Arrange adequate coordinating time. (One-half hour per week per student should be allocated in the coordinator's weekly schedule)

_____ 11. Prepare a yearly calendar of events. See Form D.

_____ 12. Organize a dynamic student organization to serve the needs of the office education students.

Forms:

A - Student Needs

B - Community Business Survey

C - Advisory Committee Composition and Operation

D - Calendar of Events

Phase II - Checklist No. 1 - Form A

Form A - STUDENTS NEEDS

Students as individuals have many needs, some of which can and should be met by the formal educational program within the school. The educational goals of each student will vary in appropriateness and also in the degree to which they are organized within the student's own mind. A student being considered for admission to the cooperative program must have a beginning awareness of why the training is wanted and what it will do for the student.

After discussing the program with the student, it is the joint responsibility of the school counselor and the COE coordinator to determine if the program can meet the student's recognized needs. Cooperative training is designed to meet the need for:

1. Occupational preparation
2. Practical work experience
3. Direction in choosing an occupational field on which to concentrate at the post-secondary level
4. Financial assistance to prolong school life
5. Increased self-reliance and poise.

Phase II - Checklist 1 - Form B

Form B - BUSINESS COMMUNITY SURVEY*

(SAMPLE FORM)*

__________ School
Business Community Survey

I. Name of business: ____________________

II. Address: ____________________

III. Type of business: ____________________ Phone: ________

IV. Name of owner or manager: ____________________

V. Person completing questionnaire: ____________________ Title: ________

VI. Approximate number of full-time office employees: Male _____ Female _____

VII. Approximate number of part-time office employees:
Adult: Male _____ Female _____
Student: Male _____ Female _____

VIII. Educational requirements for full-time office positions: ____________________
____

IX. Job entrance tests administered, if any: ____________________

X. Please indicate the number of office employees you now have in each of the following positions and the skill requirements for job entrance:

NUMBER EMPLOYED		SKILL REQUIREMENTS
_____	File Clerk	____________________
_____	Clerk-Typist	____________________
_____	Receptionist	____________________
_____	Stenographer	____________________
_____	Secretary	____________________
_____	Mail Clerk	____________________
_____	Keypunch Operator	____________________
_____	Bookkeeper	____________________
_____	Transcribing Machine Operator	____________________
_____	Duplicating Machine Operator	____________________
_____	Calculating Machine Operator	____________________
_____	Word Processing Machine Operator	____________________
_____	Others (Please list)__________	____________________
____________________		____________________

XI. Do you have any difficulty securing qualified office employees? ________
If yes, for what types of office positions? ____________________

XII. Does office employment in your firm increase during a particular time of the year? yes _____ no _____
If yes, when? ____________________ For what positions? __________________

XIII. Possible COE training stations:

Cooperative Office Education is a training program in office occupations in which the students attend classes part of the school day and are employed in offices during the other part of the day. A teacher-coordinator correlates classroom instruction with on-the-job training.

A. Would you be willing to provide work experience opportunities for COE students? yes _____ no _____

B. If yes, what types of part-time office positions could you offer?
____

C. If no, please explain: ____
____

XIV. Please check below the types of office learning experiences you can possibly provide COE student-learners:

_____ Telephone Usage
_____ Filing
_____ Manual Typewriter
_____ Electric Typewriter
_____ Shorthand Transcription
_____ Machine Transcription
_____ Bookkeeping
_____ Data Processing
_____ Keypunch
_____ Mail Procedures

_____ Receptionist
_____ Billing Clerk
_____ Ten-Key Adding Machine
_____ Electronic Calculator
_____ Spirit Duplicator
_____ Stencil Duplicator
_____ Offset Duplicator
_____ Word Processor
_____ Payroll Records
_____ Others (Please list)
____

XV. In your opinion, what are likely to be the best job opportunities in office occupations in the next five years? ______________________________
____
____

---

*Dept. of Education, A Competency-Based Guide for Organizing and Administering Cooperative Office Education, (June, 1979) Richmond, VA, p. 2.5 and 2.6.

Phase II - Checklist No. 1 - Form C

Form C - ADVISORY COMMITTEE

An effective advisory committee may serve as a sounding board for advice in such areas as:

A - Review of the goals and objectives of the program

B - Development of public relations program

C - Sources of employment training opportunities

D - Sources and types of instructional material

E - Resource personnel for related classroom instruction

F - Recommended minimum job performance standards

G - Identification of adult education needs

H - Assistance in organizing a follow-up program of cooperative programs

I - Evaluation of the office education program

Phase II - Checklist No. 1 - Form D

Form D - CALENDAR OF EVENTS

Month		Activity
AUGUST	a.	Attend the summer coordinator's conference for office education.
	b.	Re-evaluate each student-learner's interests, aptitudes, and abilities.
	c.	Check confidential reports from teachers and counselors concerning student-learners.
	d.	Set up student file folders and complete permanent record cards, including test scores and notes.
	e.	Start student-learner interviews and placements for students who were not placed in the spring.
	f.	Survey for new training stations and re-check those stations where students are already placed.
	g.	Make an inventory check of all equipment and desirable teaching aids and materials.
	h.	Check on complete physical facilities and secure any needed instructional materials, supplies, teaching aids, and equipment.
	i.	Prepare broad lesson plans for the year.
	j.	Initiate selected publicity relations activities. (See Phase VIII - Public Relations)
SEPTEMBER	a.	Recognize work needs of each student and provide specific instruction in related class. This should be accomplished every week.
	b.	Conduct orientation classes for new students who did not receive orientation in the spring. During this class, introduce forms and reporting procedures.
	c.	Review class schedules and provide classrooms for related instruction.
	d.	Conduct Advisory Committee meeting.
	e.	Complete all student placements if possible.
	f.	Begin keeping a daily record of class attendance of all students.
	g.	Hold open house for parents, businessmen, and teachers.
	h.	Organize a youth club.
	i.	Evaluate student-learners' progress during training station visitations.
	j.	Conduct a parent orientation meeting.
	k.	Join professional organizations desired.
OCTOBER	a.	Plan a news release or other public relations activity.
	b.	Make training station visitations.
	c.	Attend annual Fall Business Teachers Conference (NDEA-NDBEA).
	d.	Attend FBLA-PBL leadership conference.

Phase II - Checklist No. 1 - Form D - Continued

Month	Activity
NOVEMBER	a. Visit training stations. b. Speak to service and civic organizations about cooperative business education program. c. Complete initial report form for State Department.
DECEMBER	a. Visit training stations. b. Determine office equipment priorities for spring purchasing and recommend to Division Chairman or Administration. This should be a continuing process. c. Attend annual convention of American Vocational Association if possible.
JANUARY	a. Develop plans for recruitment of next year's students. b. Visit training stations. c. Prepare progress report for cooperating employers. d. Plan activity and publicity for vocational week. e. Confer with all student-learners individually on first semester progress. f. Plan activities for FBLA-PBL Week.
FEBRUARY	a. Plan some type of employer appreciation activity in May. b. Visit training stations. c. Make plans to attend the FBLA-PBL Leadership Conference in April.
MARCH	a. Prepare and distribute material explaining the office education program to the student body. b. Prepare news releases about the cooperative program. c. Present homeroom and assembly programs to help promote Cooperative Office Education. d. Arrange testing for prospective students. e. Visit training stations. f. Schedule interviews with prospective cooperative students. g. Administer National Business Entrance Tests. (optional)
APRIL	a. Attend FBLA-PBL Leadership Conference. Have student members enter competition. b. Select new cooperative students. c. Begin orientation of new students. d. Secure assistance of counselors in scheduling classes for next year's cooperative students. e. Visit training station. f. Review instructional and equipment needs for coming year. g. Plan activity for National Secretaries Week.
MAY	a. Visit training stations.

Phase II - Checklist No. 1 - Form D - Continued

Month	Activity
MAY	b. Continue orientation for cooperative students.
	c. Hold Employer Appreciation Banquet.
	d. Aid Students in securing permanent jobs upon graduation.
	e. Participate in departmental meeting for evaluation and planning purposes.
	f. Order supplies, new books, periodicals, and equipment for next year's program.
	g. Organize alumni group for the coming year. (optional)
	h. Complete End-of-Year Report.
JUNE	a. Begin student placements for following year.
	b. Continue orientation and counseling of students.
	c. Bring instructional and administrative files up to date.
	d. Begin work on the follow-up report for this year's graduates.
	e. Visit training stations.
	f. Prepare an annual report for school administration and Advisory Committee members.

JANUARY
FEBRUARY
MARCH
APRIL

MAY
JUNE
JULY
AUGUST

SEPTEMBER
OCTOBER
NOVEMBER
DECEMBER

Checklist No. 2 - Review of On-Going Program

Objective: To emphasize maintenance and improvement activities of an on-going cooperative office education program.

Suggested Activities:

_____ 1. Prepare a schedule of activities for the coming year. See pp. 14-16.

_____ 2. Conduct training station conferences with supervisors for improving on-the-job instruction.

_____ 3. Review and revise step-by-step training plan for possible improvement. Refer to Appendix A.

_____ 4. Review and revise on-the-job rating sheets for each student-learner. (See Form A.)

_____ 5. Locate and select new training stations.

_____ 6. Prepare a summary report to cooperative employers on instructional activities provided for each student-learner. (See Form B)

_____ 7. Review and revise past public relations program for possible improvement. (See Phase VIII)

_____ 8. Work closely with advisory committee in promotional and improvement activities.

_____ 9. Consider any other areas for possible improvement of the program during the coming year.

Forms:

A - Student Rating Sheet

B - Report on Related Class Instruction

Phase II - Checklist No. 2 - Form A

Form A - STUDENT RATING SHEET

MINOT STATE COLLEGE
OFFICE EDUCATION PROGRAM
REPORT ON STUDENT WORKER BY SUPERVISOR

NAME OF STUDENT ______________________________ DATE __________

NAME OF EMPLOYER ______________________________

EMPLOYER'S ADDRESS ______________________________

NAME OF PERSON FILLING OUT THIS FORM ______________________________

POSITION ______________________________

STUDENT LEARNER'S SCHEDULE OF HOURS: FROM ________ TO ________

Circle the phase which is most descriptive of the employee's performance.

1. Consider this employee's dependability in assuming and fulfilling job assignment. (REMARKS)

   Completely reliable ______________
   Requires minimum direction ______________
   Requires normal supervision ______________
   Requires close supervision ______________
   Needs direction & frequent checking ______________

2. Consider this employee's judgement. ______________

   Frequently makes incorrect decisions ______________
   Consistently makes sound decisions ______________
   Judgement sound under normal circumstances ______________
   Occasionally makes incorrect decisions ______________

3. Consider this employee's attitude toward job, supervision, and other employees.

   Occasionally indifferent & uncooperative ______________
   Generally interested and cooperative ______________
   Exceptionally enthusiastic & cooperative ______________
   Often disinterested and uncooperative ______________

4. Consider the amount of effort this employee applies to the job.

   Steady worker ______________
   Sometimes wastes time ______________
   Frequently wastes time ______________
   Extremely industrious ______________

Phase II - Checklist No. 2 - Form A - Continued

5. Consider the effect this employee has on others.

Creates excellent impression ____________
Sometimes creates an unfavorable impression ____________
Frequently impresses people unfavorably ____________
Impresses people favorably ____________

6. Consider this employee's ability to learn.

Adequate learning ability ____________
Has frequent difficulty in learning ____________
Learns rapidly ____________
Has some difficulty in learning ____________

7. Consider quantity of acceptable work produced by employee.

Output consistently above requirements of job ____________
Meets normal production requirements of job ____________
Output occasionally below requirements of job ____________
Production frequently below job requirements ____________

8. Consider the quality of the work produced by employee.

Consistently below job requirements ____________
Very accurate and neat ____________
Usually accurate and neat ____________

Employee's manners: ________ Good

________ Needs improving

Employee's appearance: ________ Satisfactory for type of job

________ Needs improving

Phase II - Checklist No. 2 - Form B

Form B - REPORT OF RELATED CLASS INSTRUCTION

This activity is part of the coordinator's responsibility in carrying out the training plan. A well drawn training plan shows both vocational and related instruction scheduled for a given student in the job station. Informing the supervisor lets it be known that the school is carrying out the responsibility assumed when the outline was jointly approved.

The following plan may be used as an outline for informing the supervisor:

A. Review the training outline

  1. To get instruction scheduled for period.

B. Plan the call

  1. To meet best time for supervisor to talk it over.

C. Talk with the supervisor

  1. Outline the training given recently.
  2. Check the supervisor's observations on use of the new skill or information on the job.
  3. Get the supervisor's suggestions for modifications or further emphasis.

D. Plan further training jointly

  1. To fit present or anticipated job experience.
  2. To include remedial instruction if needed.
  3. Use results of objective measurements.

INCOME
EXPENCES

PHASE III

DEVELOPMENT OF CRITERIA FOR SELECTION OF STUDENT-LEARNERS

PAGE

1. Establishment of Criteria 21

   A. Criteria Concerning Educational Requirements in the Selection of Student-Learners 22

   B. Criteria for Selection of Students for Office Education Part-Time Training Program.......... 23

PHASE III - DEVELOPMENT OF CRITERIA FOR SELECTION OF STUDENT-LEARNERS

Checklist No. 1 - Establishment of Criteria

Objective: To develop educational and non-educational criteria for selecting students.

Suggested Activities:

_____ 1. Review Form A concerning criteria establishing educational requirements.

_____ 2. Review Form B concerning non-educational criteria for selection of students.

_____ 3. Refer to Phase IV, Selection of Students, Checklist No. 6 (pp.38, 39) concerning training of students of limited ability who do not meet criteria in Forms A and B.

Forms:

A - Criteria Concerning Educational Requirements in the Selection of Student-Learners

B - Criteria for Selection of Students for Office Education Part-Time Training Program

Phase III - Checklist No. 1 - Form A

Form A - CRITERIA CONCERNING EDUCATIONAL REQUIREMENTS IN THE SELECTION OF STUDENT-LEARNERS

Suggested educational criteria for selection of student-learners are as follows:

1. The student-learner should indicate an interest in some phase of office education.
2. The student-learner should have successfully completed a sufficient number of business courses to profit from the related classroom and training activities.
3. The student-learner who plans to work at stenographic training stations should have no grade lower than C in beginning typewriting and shorthand.
4. The student-learner who plans to work at bookkeeping or at accounting training stations should have no grade lower than C in bookkeeping or in closely related courses such as recordkeeping and business mathematics.
5. The student-learner must have sufficient school credits to qualify for senior status.

Phase III - Checklist No. 1 - Form B

Form B - CRITERIA FOR SELECTION OF STUDENTS FOR OFFICE EDUCATION PART-TIME TRAINING PROGRAM

1. Age - Students must be at least 16 years of age so that they may be employed in a gainful occupation.

2. Occupational interest - Students should be selected who have career objectives which can be met by the training program.

3. Minimum educational requirements - Students should possess minimum educational qualifications before being allowed to enroll.

4. Interest in training program - Students should have a definite interest in and desire to receive all the training that is provided.

5. Health - No student should be allowed to enroll if the work experience on the job will be detrimental or harmful to one's health or well being.

6. Past record - Students past record should indicate good school attendance, participation in extra curricular activities, commendable work habits, and similar characteristics.

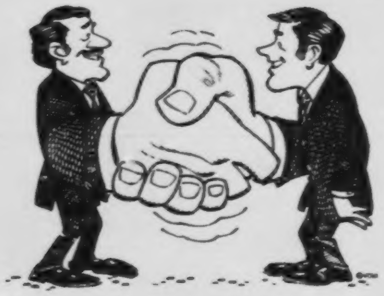
7. Grade level in school - Students should be of senior standing.

8. Personal characteristics and traits - Students should possess or be willing to develop personal traits that best fit them to their chosen occupation. Some of these include appearance, speech, intelligence, aptitudes, dependability, accuracy, and initiative.

9. Need for a part-time job - Students needing part-time work to stay in school must meet all other standards for selection.

10. Student having own part-time job - Students who already have part-time jobs and meet the standards for selection may continue this employment if it meets the qulaifications as a training station.

11. Permission of parents and school administration - Students must have received permission from their parents before final enrollment of student.



PHASE IV

SELECTION OF STUDENT-LEARNERS

PAGE

1. Orientation and Survey of Student Body 24
   - A. Outline of Orientation Speech to Student Body 25
   - B1 Student Interest Survey 26
   - B2 Student Survey Form 27

2. Compilation of Student's Personal and Educational Data.. 28
   - A. Students Who Should be Considered for Selection..... 29
   - B. Application Blank — Applicable to All Vocational Programs 30
   - C. Sample Letter to Parents of Prospective COE Students 32

3. Utilization of Guidance Department in Selection of Student-Learners 33

4. Interviews with Students by Coordinator................. 34
   - A. Reasons a Student Might Have Requested Enrollment . 35
   - B. Conducting the Initial Interview 36

5. Orientation of Parents to Vocational Office Education 37

6. Evaluation of Students.................................. 38
   - A. Final Interview 39

PHASE IV - SELECTION OF STUDENT-LEARNERS

Checklist No. 1 - Orientation and Survey of Student Body

Objective: To inform the student body about the office education program.

Suggested Activities:

_____ 1. Make a special effort to meet with 9th grade students so they are aware of the availability of cooperative office education program.

_____ 2. Speak to students in home rooms or at student body assembly explaining the office education program. (See Form A)

_____ 3. Prepare and distribute cooperative office education interest questionnaires to the student body. Utilize Form B_1 for all students and B_2 indicating an office education preference.

_____ 4. For a follow-up of those students indicating an interest on the questionnaire, see Checklist No. 4, pp. 34-36.

Innovative Activities:

_____ 1. Prepare posters, window displays, bulletin boards, (utilize pictures taken on the job) and school and local newspaper stories to inform the student body.

_____ 2. Prepare and distribute brochures about cooperative office education.

_____ 3. Prepare or obtain a skit promoting program to be presented at an assembly program. Note: See Phase VIII (Public Relations)

Forms:

A - Outline of Orientation Speech to Student Body

B_1- Student Interest Survey

B_2- Student Survey Form

Phase IV - Checklist No. 1 - Form A

Form A - OUTLINE OF ORIENTATION SPEECH TO STUDENT BODY

The following items are those which could be covered when explaining the office education program to students:

1. Pros and cons of working in the area of office education.
2. An explanation of the daily life of a cooperative student.
3. The qualifications and preparation needed to enroll in a cooperative program.
4. Advantages and disadvantages of being a cooperative student.
5. Personal success experiences.
6. Requirements of office cooperative education.
7. The responsibilities of student-learners in cooperative office education.

Phase IV - Checklist No. 1 - Form B_1

Form B_1 - STUDENT INTEREST SURVEY

COOPERATIVE OFFICE EDUCATION PROGRAM
__________, North Dakota

Name ______________________________ Date ______________

Grade Level __________ Date of Birth __________ Male _____ Female _____

Home Room Teacher ______________________________

Do you plan to:

(1) Attend college? Yes _____ No _____
(2) Attend junior college? Yes _____ No _____
(3) Attend private business college? Yes _____ No _____
(4) Seek employment? Yes _____ No _____

Name of school or college you plan to attend ____________________

*What field or vocation would you like to enter? Rank in order of preference your top three choices.

_____ Office Work (secretarial, clerical, receptionist, etc.)
_____ Selling
_____ Store Management
_____ Office Management
_____ Agribusiness (feed store operator, elevator operator, etc.)
_____ Agriculture
_____ Mechanic
_____ Nursing (R.N., P.L.N., Nurses Aid)
_____ Printing
_____ Church Work (Parish secretary)
_____ Photography
_____ Service Station owner or attendant
_____ Military
_____ Data Processing
_____ Medical Technology
_____ Accounting
_____ Other ____________
_____ Other ____________
_____ Other ____________

*This could be constructed from local survey results.

Phase IV - Checklist No. 1 - Form B_2

Form B_2 - STUDENT SURVEY FORM

*STUDENT SURVEY FORM

Name of Student ______________________________ Date ____________

School Year ____________________________ Grade Level ____________

I am employed part-time: Yes ____ (If yes, answer #1, 2, and 3)
No ____ (If no, answer #4)

(1) Occupation ____

(2) Name of Employer ______________________________________

(3) Address of Employer ___________________________________

(4) I am not currently working but am interested in studying under the vocational cooperative office program. Yes ____ No _____

I am now working and feel I would benefit from classroom training that would help me do a better job. Yes ____ No _____

I am undecided. Please give me additional information. ____

Signature ______________________

*Copy sent to Guidance Department

PHASE IV - SELECTION OF STUDENT-LEARNERS

Checklist No. 2 - Compilation of Student's Personal and Educational Data

Objective: To establish a file for each student who shows an interest in office education.

Suggested Activities:

_____ 1. Consider the types of students who are interested in entering the office education program. See Form A for a classification of these students.

2. Obtain information from the following sources:

_____ (a) Guidance Counselor
_____ (b) Classroom Teacher
_____ (c) School Records
_____ (d) Students
_____ (e) Parents
_____ (f) Community

_____ 3. Obtain information about each student necessary for selection of student-learner.

_____ 4. Set up application form for each student when applying for admittance to program. See Form B as an example. Administer form and file in student's folder.

_____ 5. Send personalized letter to parents of interested students.

_____ 6. Consider students varying in ability from slow learners to fast achievers because of various business requirements.

Forms:

A - Students Who Should be Considered for Selection

B - Application Blank - Applicable to All Vocational Programs*

C - Sample Letter to Parents of Prospective COE Students

*Refer to Invasion of Privacy Form in Phase IX

Phase IV - Checklist No. 2 - Form A

Form A - STUDENTS WHO SHOULD BE CONSIDERED FOR SELECTION

Students who should be given primary consideration for selection in the program can be grouped into the following categories:

1. Those who will enter full-time office employment immediately upon graduation.
2. Those who have a specific goal in office occupations in mind and plan to take additional education and training on the post-high school level.
3. Those who plan to enter some phase of business education at the college level.
4. Those whose present activity and/or employment indicates an interest in office education.

Phase IV - Checklist No. 2 - Form B

Form B - APPLICATION BLANK - APPLICABLE TO ALL VOCATIONAL PROGRAMS

__________ HIGH SCHOOL
____________, North Dakota
Cooperative Office Education Program

STUDENT APPLICATION FOR COOPERATIVE OFFICE EDUCATION

PERSONAL INFORMATION:

Name ______________________ Soc. Sec. No. ______________ Date ____________

Address ____ Phone ______________

Do you have any physical handicaps, such as weak eyes, poor hearing, etc.? _
____

Family Doctor ______________________ Homeroom Teacher & Number ___________

Birthday _________ Height _______ Weight ________ Health __________________

Father's Name ______________ Occupation ___________ Where ________________

Mother's Name ______________ Occupation ___________ Where ________________

Guardian's Name ____________ Occupation ___________ Where ________________

Number of brothers __________________ Number of sisters __________________

SCHOOL:

Is it necessary for you to contribute to your own support while in high school? ___

What prompted your interest in the program? _______________________________

How do you spend your leisure time? ______________________________________

What high school subject do you like best? ________________________________

Why? ____

In what extracurricular activities have you taken part? __________________
____

In what subject do you make your best record? _____________________________

Do you intend to go to college? ____

How many days were you absent last year? _________________________________

Phase IV - Checklist No. 2 - Form B - Continued

What subjects do you need to graduate? ______________________________

Have you discussed this program with your parents? ____________________

Do you have a hobby? __________ What ______________________________

What high school subject do you like the least? ____________________

Why? ____

Do you get along well with others or do you prefer to be alone? __________

How many credits have you earned in the following: English ____________

Math _____ Science _____ History _____ Foreign Language _____ Shop _____

Business Education _____ Home Economics _____ Others ______________

OCCUPATIONAL INFORMATION:

Are you interested in (a) getting a job? _____ or (b) training for future work?______

If you have ever been employed, fill in the following; if not, list one or more persons other than relatives for character references:

Employer or Reference	Address	Dates	Type of Work

What type of training do you desire? __________ (Clerical or Secretarial)

I shall do my part in assisting my son/daughter to fulfill all obligations to the program, including regularity of attendance and maintaining of a satisfactory scholastic standing.

Approved ____
(Parent or Guardian)

Signed ____
(Student applicant)

Phase IV - Checklist No. 2 - Form C

Form C - SAMPLE LETTER TO PARENTS OF PROSPECTIVE COE STUDENTS*

COOPERATIVE OFFICE EDUCATION PROGRAM
__________ HIGH SCHOOL
__________, North Dakota

Dear Mr. and Mrs. _______________:

At this time each year we counsel with students concerning their vocational interests. Your son/daughter has indicated an interest in our Cooperative Office Education (COE).

Cooperative Office Education is a unique experience for any young person. It gives the student an opportunity to study office occupations on the job.

The advantages to ________ would be many; earning money while receiving school credit, working within a controlled, carefully supervised program, and learning about career opportunities in business. This program has merit for every student whether or not further education at a college or technical center is part of their future plans.

If _________ enrolls in COE, he/she would be assuming the following responsibilities:

1. Regular attendance in school and on the job.
2. Student cannot report for work in the afternoon if absent from school in the morning without the coordinator's permission.
3. The employer and school must be notified if the student must be absent from work.
4. Each member in the office occupational program in which COE students are trained should hold membership in National, State, and local Future Business Leaders of America (FBLA) student organization.

Our brochure, entitled "COE at ______ High School" is included with this letter to provide information on Cooperative Office Education. If you have additional questions, please contact me at _________________.

Sincerely,

COE Coordinator

XX
Enclosure
(This should be a personalized letter)

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*Dept. of Education, A Competency-Based Guide for Organizing and Administering Cooperative Office Education, (June, 1979) Richmond, VA, p. 3.5.

PHASE IV - SELECTION OF STUDENT-LEARNERS

Checklist No. 3 - Utilization of Guidance Department in Selection of Student-Learners

Objective: To develop a professional relationship with the Guidance Dept. for obtaining and utilizing information about students.

Suggested Activities:

_____ 1. Discuss in detail the office education program and how assistance is needed from the Guidance Department for the success of the program. This includes junior and senior high school counselors and junior high principals.

_____ 2. Review list of student-learner applicants with guidance counselor.

_____ 3. Check files of each applicant with guidance counselor for background information such as attendance and punctuality records, health and family background, etc.

4. Ask Guidance Department to administer a battery of tests such as:

_____ (a) Strong Interest Inventory
_____ (b) Kuder - Sophomore level
_____ (c) Minnesota Inventory
_____ (d) Minnesota Clerical Apptitude

_____ 5. Consult North Dakota Job Service concerning the administration of the General Ability Test Battery (GATB) during junior year.

DECISIONS!
DECISIONS!
DECISIONS!

PHASE IV - SELECTION OF STUDENT-LEARNERS

Checklist No. 4 - Interviews with Students by Coordinator

Objective: To conduct professional interviews to help students meet job objectives.

Suggested Activities:

_____ 1. Schedule student-learner interviews allowing at least one-half hour per student.

_____ 2. Review the reasons which students may have for requesting enrollment in the program. Refer to Form A.

_____ 3. Determine procedure to be followed in conducting initial interview. See Form B.

_____ 4. Develop a list of items to be discussed with student during interview. See Form B.

Forms:

A - Reasons a Student Might Have Requested Enrollment

B - Conducting the Initial Interview

Phase IV - Checklist No. 4 - Form A

Form A - REASONS A STUDENT MIGHT HAVE REQUESTED ENROLLMENT

1. Want on-the-job experience offered by the program.
2. Want to earn some extra money.
3. Thought it would be easier to get a job after graduation.
4. Interested in learning about the different phases of business office occupations.
5. Felt that time spent in office preparatory classes would be more useful than time spent in other classes.
6. Thought it would be possible to get a better salary after graduation.
7. Want school credit for a job they already have.
8. Did not do very well in other courses.
9. A friend took it and had a good time.
10. Likes typewriting and shorthand.

Phase IV - Checklist No. 4 - Form B

Form B - CONDUCTING THE INITIAL INTERVIEW

The purpose of the interview is to meet and learn about the student. To be effective, student interviews should be planned in advance. The coordinator should study information about each student interviewee. The following items to be covered in the interview are suggested:

1. Give the student appropriate information about the office program.
2. Explain what the office education program is and how it might relate to the student's future.
3. Discuss the student's career plans and how office education enters into them.
4. Discuss the student's abilities, aptitudes, and interests as they relate to the student's future.
5. Try to determine whether the student seems likely to profit from office education.
6. Ask the student for the names of two or three teachers he/she feels know her/him best.
7. Ask about grades and attendance.
8. Mention that transportation to and from a job is the student's responsibility.
9. Offer assistance for occupational development.

A procedure for conducting interviews should be followed to obtain information desired. The following procedure is suggested:

1. Greet the student pleasantly by name; be natural.
2. Provide a place for books to be placed and ask the student to be seated.
3. Use a "warm-up" topic as opener to put the student at ease.
4. Come to the point of the interview as quickly as possible.
5. Help the student to feel free to express himself/herself.
6. Be a good listener and help the student to make her/his own decisions.
7. Be objective.
8. Be aware of your limitations.
9. End on a constructive note.

PHASE IV - SELECTION OF STUDENT-LEARNERS

Checklist No. 5 - Orientation of Parents to Vocational Office Education

Objective: To become acquainted with the parents of student-learners through conferences, parents' night, and other activities.

Suggested Activities:

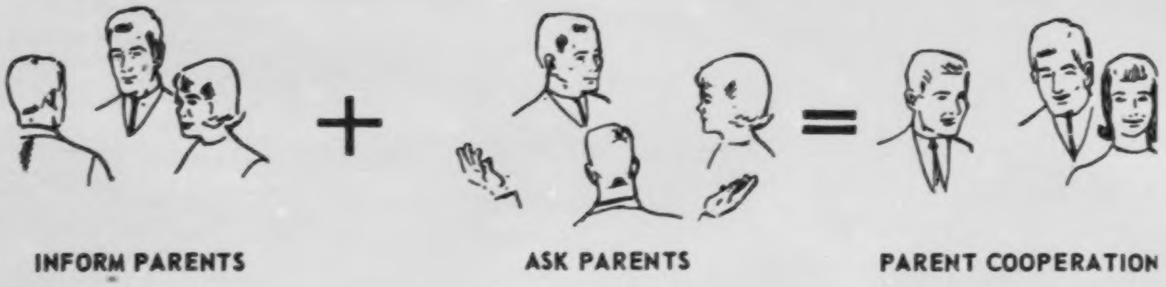
_____ 1. Request conferences with parents as this type of contact may yield useful information about the student's home life.

_____ 2. Request parents' visitation to the opportunity for the parent to see the setting in which the child spends the day. Use a letter as means for issuing the invitation.

Innovative Activities:

_____ 1. Organize a parents' night for cooperative students in conjunction with other vocational areas.

_____ 2. Host an open house with vocational office education parents as honored guests.



PHASE IV - SELECTION OF STUDENT-LEARNERS

Checklist No. 6 - Evaluation of Students

Objective: To evaluate students who will be benefited by the Office Education Program.

Suggested Activities:

1. The office teacher-coordinator should have a wealth of information in the student's file folder to help in the selection. Therefore, the coordinator should:

_____ (a) List the applicants;
  - Those who are definitely desirable.
  - Those who are acceptable.
  - Those about whom doubts exist.

_____ (b) Review all information about each student applicant individually and carefully.

_____ (c) Go over lists with the counselors and other faculty members who know both the student and the program for further screening.

_____ (d) Make final decision.

_____ (e) Meet with the counselor and other appropriate school personnel and submit a list of students;
  - Who are selected.
  - Who were not selected and explain specific reasons for not selecting them.

_____ (f) Notify those students who have not been selected and explain why through personal conferences or other appropriate means of communication.

_____ (g) Call a meeting of those who have been selected to inform them of their selection to the program.

_____ 2. The coordinator should, if at all possible, place students with limited ability who do not meet standards set up in Phase III in routine clerical and machine operation jobs.

Innovative Activities:

_____ 1. In place of calling a meeting to notify student-learners that they have been selected, as indicated above, a final interview may be conducted with each student-learner. See Form A

Forms:

A - Final Interview

Phase IV - Checklist No. 6 - Form A

Form A - FINAL INTERVIEW

The final interview is the most important and time consuming in student-learner selection. During the school year, the teacher-coordinator should have made periodic checks with the classroom teachers concerning the progress of the students who plan to enter the office cooperative education program. Therefore, the final interview becomes an experience which will aid the student in his initial employment interview and is more in depth than any of the previous meetings with the student. The format may remain similar to the initial interview except special emphasis should be placed on point 1 - 5 of Form B, Checklist No. 4. In addition, the following items should also be discussed:

1. Training agreement.
2. Student's choice of the type of training station.
3. Interviewing techniques.
4. Office coordinator's expectations of the student-learner.

In most cases the student-learner will be notified that he/she has been selected for the program at this time. However, it should again be noted that additional conferences with administration, counselor, parent, student, and coordinator may be required before the final decision is reached.

PHASE V

DEVELOPMENT OF CRITERIA FOR SELECTION OF TRAINING STATIONS

PAGE

1. Criteria for Selection of Training Stations. 40
   A. Criteria for Selection of Training Stations 41
   B. Dictionary of Occupational Titles Listings 42

PHASE V - DEVELOPMENT OF CRITERIA FOR SELECTION OF TRAINING STATIONS

Checklist No. 1 - Criteria for Selection of Training Stations

Objective: To develop criteria for selection of cooperative training stations in terms of the quality of educational experience they can provide.

Suggested Activities:

_____ 1. Review Form A concerning criteria used in the selection of prospective training students.

_____ 2. Check the Dictionary of Occupational Titles listings for appropriateness of job classification as indicated on Form B.

OCCUPATIONS
VOTE

Forms:

A - Criteria for Selection of Training Stations

B - Dictionary of Occupational Titles Listings

Phase V - Checklist No. 1 - Form A

Form A - CRITERIA FOR SELECTION OF TRAINING STATIONS

1. TYPE OF OCCUPATION: The training station should provide experience in occupations that require both skills and knowledge. The Dictionary of Occupational Titles should be checked to determine appropriateness of job classification.

2. JOB TRAINING OBJECTIVES: The training station should provide experiences relevant to the career goal of the student.

3. VARIETY OF EXPERIENCES: The training station should provide a wide variety of experiences associated with the occupation. It should not merely be routine work experience of repetitive nature.

4. ON-THE-JOB SUPERVISION: The training station should be supervised by personnel competent in the skills and technical aspects of the occupation. The supervisor should be interested and eager to assist in the training program.

5. WORKING CONDITIONS: Safe and sanitary working conditions of training stations with adequate safety prevention policies should be provided. Adequate liability insurance should be carried by the firm.

6. FIRM REPUTATION: Business establishments who furnish training stations should have a good reputation through ethical business practices in the community.

7. EMPLOYMENT REQUIREMENTS: A sufficient number of working hours (suggest five to 15 per week for the school year) at the training station should be provided.

8. FACILITIES AND EQUIPMENT: Up-to-date facilities and equipment should be used at the training station.

9. SUPERVISOR AND STUDENT-LEARNER: Good supervisor and student-learner relationships should exist at the training station.

10. FIRM LOCATION: The firm should be accessible by car or public transportation by the student-learner.

11. ADEQUATE SALARY: The salary for the student-learner should be based on that paid other employees of similar experience and training and should not be less than the minimum wage in effect at that time.

Phase V - Checklist No. 1 - Form B

Form B - DICTIONARY OF OCCUPATIONAL TITLES LISTINGS

Introduction

Each job definition in the Dictionary of Occupational Titles has a code number of six digits. The digits have individual significance for users of the D.O.T. The coding for the job definition of secretary (clerical) is 201.362 in the D.O.T.

The first three digits, 201, refer to the occupational classification by category, division, and further refined (referred to as such in the D.O.T.) three-digit group. The first digist refers to an occupational category, the second to a division, and the third to the subsequent three-digit group.

ACCOUNTING AND COMPUTING OCCUPATIONS

Dictionary of Occupational Titles		
Accountants	160.267-010	Credit Analyst, Chief (finan. inst.)
Bookkeepers	210.367-010	Account-Information Clerk (light, heat & power)
	210.382-014	Bookkeeper (clerical) I
Cashiers	211.362-010	Cashier (clerical) I
	211.462-034	Teller (light, heat & power)
Machine Operators (clerical)	214.482-010	Billing-Machine Operator (Clerical)
	210.382-022	Bookkeeping-Machine Operator (Clerical) I
	210.382-026	Bookkeeping-Machine Operator (Clerical) II
	216.482-022	Calculating-Machine Operator (Clerical)
	217.382-010	Proof-Machine Operator (finan. inst.)
Tellers	211.132-010	Teller, Head (Finan. inst.)
Accounting and Computing Occupations, Other	215.137-014	Payroll Clerk, Chief (Clerical)

BUSINESS DATA PROCESSING SYSTEMS OCCUPATIONS

Dictionary of Occupational Titles

Business Data Processing Systems Occupations	213.132-014	Supervisor, Machine-Records Unit (Clerical)
Computer and Console Operators	213.362-010	Computer Operator (Clerical)
Peripheral Equipment Operators	213.382-010	Card-Tape-Converter Operator (Clerical)
Key Punch and Coding Equipment Operators	203.582-030	Key-Punch Operator (Clerical)
Programmers	020.167-018	Programmer, Chief, Business (Profess. & Kin.)
Systems Analyst	012.167-066	Systems Analyst, Electronic Data Processing (Profess. and Kin.)

FILING, OFFICE MACHINES, AND GENERAL OFFICE CLERICAL OCCUPATIONS

Dictionary of Occupational Titles

Duplicating Machine Operators	207.682-010	Duplicating-Machine Operator (Clerical) I
	207.682-014	Duplicating-Machine Operator (Clerical) II
	207.682-018	Offset-Duplicating Machine Operator (Clerical)
	207.685-014	Photocopying Machine Operator (Clerical)
Perforator Typist	203.582-038	Typewriter Operator-Automatic (Clerical)
	203.582-066	Typist (Clerical)
File Clerks	206.362-010	File Clerk (Clerical) I
	206.367-014	File Clerk (Clerical) II
General Office Clerks	209.687-010	Billing Checker (Clerical)
	214.382-014	Billing Clerk (Clerical)
	214.482-010	Billing Clerk (Clerical)
	219.362-010	Administrative Clerk (Clerical)
	219.362-034	Insurance Clerk (Finan. inst.) I
Filing, Office Machines, and General Office Clerical Occupations, Other	201.132-014	Transcribing Operator, Head (Clerical)
	209.367-046	Title Searcher (Real Estate)
	209.587-010	Addresser (Clerical)

Phase V - Checklist No. 1 - Form B - Continued

INFORMATION COMMUNICATIONS OCCUPATIONS

Dictionary of Occupational Titles

Communication Systems Clerks and Operators	235.462-010	Central-Office Operator (Tel. & Tel.)
	235.662-026	Telephone Operator (Clerical)
Correspondence Clerks	209.262-010	Correspondence Clerk (Clerical)
Mail and Postal Clerks	209.587-026	Mail Clerk (Clerical)
	230.367-010	Mail Carrier (Gov. Ser.)
Mail-Preparing and Mail-Handling Machine Operators	208.685-034	Wing-Mailer Machine Operator (Print. & Pub.)
Messengers and Office Boys and Girls	239.567-010	Messenger, Office (Clerical)
	239.567-010	Office Helper (Clerical)
Receptionist and Information Clerks	237.367-022	Information Clerk (Clerical)
	205.362-030	Out-Patient Admitting Clerk (Med. Ser.)
Information Communication Occupations, Other	245.362-010	Medical-Record Clerk (Med. Ser.)

MATERIALS SUPPORT OCCUPATIONS

Dictionary of Occupational Titles

Planning and Production Clerks	221.382-018	Production Clerk (Clerical)
	221.387-034	Job Tracer (Clerical)
Quality Control Clerks	209.587-042	Return-to-Factory Clerk (Clerical)
Shipping and Receiving Clerks	222.387-050	Shipping Clerk (Clerical)
	222.367-018	Expediter (Clerical)
Stock and Inventory Clerks	222.387-026	Inventory Clerk (Clerical)
Traffic, Rate and Transportation Clerks	249.167-014	Dispatcher, Motor Vehicle (Clerical)
Materials Support Occupations, Other	221.362-026	Road Clerk (R. R. Trans.)
	241.387-010	Claims Clerk (auto. mfg.)

Phase V - Checklist No. 1 - Form B - Continued

STENOGRAPHIC, SECRETARIAL, AND RELATED OCCUPATIONS

Dictionary of Occupational Titles

Executive Secretary	201.362-010	Legal Secretary (Clerical)
Secretaries	201.362-014	Medical Secretary (Med. Ser.)
	201.362-030	Secretary (Clerical)
Stenographer	202.362-010	Court Reporter
	202.362-014	Stenographer (Clerical)

SUPERVISORY AND ADMINISTRATIVE MANAGEMENT OCCUPATIONS

Dictionary of Occupational Titles

Administrative Assistants	169.167-010	Administrative Assistants (any kind)
Budget Management Analyst	161.117-018	Treasurer (Profess. & Kin.)
Data-Methods and System Procedures Analysts		Clerical Technician File Service Worker
Office Managers and Chief Clerks	169.167-034	Manager, Office (any ind.)
	209.367-022	Disbursement Clerk (finan. inst
Supervisory, and Administrative Management Occupations, Other	162.117-018	Contract Specialist (Profess. & Kin.)
	162.267-010	Title Clerk (Petrol. production; petrol. refin.; pipe lines)

TYPING AND RELATED OCCUPATIONS

Dictionary of Occupational Titles

Clerk-Typists	203.362-010	Clerk-Typist (Clerical)
Typists	203.582-066	Typists (Clerical)
	203.582-038	Perforator Typist (Clerical)

OFFICE OCCUPATIONS, OTHER

Dictionary of Occupational Titles

Office Occupations, Other	299.467-010	Layaway Clerk (Ret. Tr.)
	241.362-010	Claims Clerk (Insurance) I
	205.367-018	Claims Clerk (Insurance) II
	249.677-010	Vault Attendent (Finan. Inst.)

PHASE VI

SELECTION OF TRAINING STATIONS

PAGE

1. Interviews with Firm Representatives 46
    - A. Sources Which the Coordinator May Use in Locating Training Stations 47
    - B. Introductory Letter 47
    - C. Interview Procedure 48
    - D_1 Business Firm Information Form 49
    - D_2 Training Station Evaluation Checksheet 50
    - E. Role of School, Cooperating Firm, and Student-Learner in a Cooperative Office Education Program 52
    - F. Training Station Assessment 53
2. Selection of Cooperating Firms 54

PHASE VI - SELECTION OF TRAINING STATIONS

Checklist No. 1 - Interviews with Firm Representatives

Objective: To develop and to utilize procedures for interviewing firm representatives.

Suggested Activities:

_____ 1. Carefully review criteria established for selection of training stations. See Phase V.

_____ 2. Prepare a list of sources for locating prospective firms which could be used as training stations. Refer to Form A. Utilize these sources in developing or reviewing a list of prospective firms.

_____ 3. Secure as much information as possible about each firm before contacting them.

_____ 4. Write a preliminary letter of introduction using Form B or one similar.

_____ 5. Schedule an appointment prior to visit.

_____ 6. Conduct interview after studying Forms C, D, and E. Form D could be completed after the interview.

_____ 7. Fill out Form F.

Innovative Activities:

_____ 1. Utilize a brochure as outlined in Phase VIII - Public Relations.

Forms:

A - Sources Which the Coordinator May Use in Locating Training Stations
B - Introductory Letter
C - Interview Procedure
D_1- Business Firm Information Form
D_2- Training Station Evaluation Checksheet
E - Role of School, Cooperating Firm, and Student-Learner in a Cooperative Office Education Program
F - Training Station Assessment

Phase VI - Checklist No. 1 - Form A

Form A - SOURCES WHICH THE COORDINATOR MAY USE IN LOCATING TRAINING STATIONS

1. Community Survey
2. Student Survey
3. Advisory Committee
4. School Administration
5. Counseling Office
6. Chamber of Commerce
7. Trade Associations
8. Telephone Directory - Classified Section
9. City Directory
10. Personal Observation
11. Previous Cooperating Business Firms
12. Current Cooperating Firms

Phase VI - Checklist No. 1 - Form B

Form B - INTRODUCTORY LETTER

Current Date

Inside Address
XXXXXXXXXXXXX
XXXXXXXXXXXXX

Dear ________________ :

Your firm has been referred to us as a potential cooperating business firm in our vocational office education work experience program.

Vocational office education cooperative programs are designed to train students for initial entrance into office occupations through a cooperative arrangement between school and business. The program provides directed in-school educational activities while the business firm provides training through planned on-the-job training experiences. This cooperative arrangement integrates both theory and practice in a meaningful sequence of learning activities.

I would appreciate the opportunity to discuss with you the purpose and operation of our vocational cooperative office education program. Within the next several days, I will call you for a possible appointment.

Sincerely yours,

Phase VI - Checklist No. 1 - Form C

Form C - INTERVIEW PROCEDURES

Purpose of Interview

The approval and utilization of a training station should be based on mutual understanding and agreement among the cooperating firm, the school administration, the coordinator, and the student-learner. The primary objective of the work station should be to train the student-learner rather than to assist the student in earning money or to assist the employer in obtaining part-time help. Experience gained at the training station should, therefore, be expected to contribute significantly to the development of knowledges, skills, and attitudes which are needed in the occupation for which the individual's training program is designed and which further the student-learner's career objective.

Specific Procedure Steps

To insure that maximum benefit will be derived from an employer interview the following specific procedures are suggested:

1. Mail to the potential cooperating firm the introductory letter as shown in Form B.
2. Arrange an interview appointment with the firm representative at his convenience. Inquire as to office location if not known.
3. Arrive on time and make proper introduction.
4. Indicate an interest by asking questions about firm.
5. Begin interview with purpose of contact.
6. Impart information about the office education program:
    a. Orient the employer to the opportunites and advantages of participation in a cooperative work experience program. See Form E.
    b. Make the employer aware of the responsibilities of the cooperative training firms.
    c. Answer any questions employer may have about the program. (For instance, which other firms are particpating in program)
7. Obtain information about potential training stations.
8. If the firm indicates an interest, Business Interview Form D may be completed later.
9. Secure the name of person who would be doing the supervision. Ask permission to meet this person to discuss details of implementing program.
10. If the employer wants time to consider, indicate you will contact at a later date.
11. Have a cordial closing.

Phase VI - Checklist No. 1 - Form D_1

Form D_1 - BUSINESS FIRM INFORMATION FORM

1. Name of Business: ______________________________
2. Person Interviewed: ______________________ Title: __________
3. Address of Firm: ______________________________
4. Phone: __________ Type of Business: ____________________
5. Number of Office Employees: _____ Men: _______ Women: _______
6. Number of Sales Employees: _____ Men: _______ Women: _______
7. Number of Trade & Technical Employees: _____ Men: _____ Women: _____
8. Number of Other Personnel: _____ Men: _______ Women: _______

Total: _____ Men: _______ Women: _______

9. Training Station Possibilities: On-the-job experiences which are supervised jointly by the cooperating employer and the coordinator of the cooperating education program.

Part-Time Office Positions:	Number Available	Hours of Employment
Stenographic:	______	______
Clerical:	______	______
General Office Work:	______	______
Bookkeeping:	______	______
Data Processing:	______	______
Other: __________	______	______

Immediate Supervisor: ______________________________

Telephone Number: ______________________________

Date of Inauguration of Program: ______________________

Phase VI - Checklist No. 1 - Form D_2

Form D_2 - TRAINING STATION EVALUATION CHECKSHEET*

Potential Training Organization ______________________________

Address ______________________________ Phone: __________

Date of Interview __________ Person Interviewed ____________________

Job Classifications (Circle appropriate titles)

File Clerk
Receptionist
Mail Clerk
Bookkeeper
Calculator Operator

Receptionist
Stenographer
Keypunch Operator
Typist
Duplicating Machine Operator

Clerk Typist
Secretary
Transcriptionist
General Office Clerk
Other ______________

Job Entrance Tests Yes No

Skill Standards Required ______________________________

Does the attitude of the employer seem conducive to effective cooperation with the school in the operation of cooperative office education? Yes No

Are there provisions for a range of on-the-job experiences? Yes No

Are the equipment and facilities satisfactory? Yes No

Is the employer willing to work with the teacher-coordinator in developing a training plan for a specific career goal? Yes No

Does employee moral seem conducive to satisfactory relationships for student-learners? Yes No

Does the instructional potential of the training organization seem satisfactory? Yes No

Is the training station satisfactorily located? Yes No

Will the monetary compensation be adequate? Yes No

Signed ______________________________
Teacher-Coordinator

---

*Dept. of Education, A Competency-Based Guide for Organizing and Administering Cooperative Office Education, (June, 1979) Richmond, VA, p. 6.4.

Phase VI - Checklist No. 1 - Form E

Form E - ROLE OF SCHOOL, COOPERATING FIRM, AND STUDENT-LEARNERS IN A COOPERATIVE OFFICE EDUCATION PROGRAM

School

1. Student-learners selected for the office education program will receive vocational counseling for the purpose of determining their tentative career objectives.

2. The related class will provide the student-learner with instruction directly related to his work activities and occupational objectives.

3. Coordination will be conducted by the coordinator who will assist the cooperating firm in the initial development of the training station. He/she will also visit the student-learner, observe student's job performance, assist the employer in the development of sound methods of on-the-job training, and determine how classroom instruction can be related to job activities.

Cooperating Firm

1. The cooperating firm will be expected to supervise the student-learner's on-the-job training with individual assignments.

2. The cooperating firm will be expected to provide a variety of planned occupational experiences commensurate with the student-learner's ability and progress.

3. The cooperating firm should provide an average of five to 15 hours of employment a week throughout each semester. At least one-half of this time should be utilized during the released school time of the student-learner.

4. A monetary wage, according to State or Federal wage laws, will be paid all beginning student-learners. This amount may be increased proportionately to the student-learner's productivity.

5. The student-learner should have the same employment status as that of other part-time employees in matters of social security, insurance, and labor laws.

6. Periodic evaluation forms concerning the job performance of the student-learner will be made by the employer or the supervisor and reported to the coordinator.

Phase VI - Checklist No. 1 - Form E - Continued

Student-Learner

1. The student will maintain appropriate standards of conduct, dress, punctuality, and attendance as required by the cooperating firm.
2. The student will strive to improve competencies by accepting constructive criticisms.
3. The student will be required to attend school.
4. The student will be required to maintain adequate standards of achievement, attendance, and conduct to remain in the program.

Phase VI - Checklist No. 1 - Form F

Form F - TRAINING STATION ASSESSMENT

Cooperating Firm: ______________________________

Supervisor: ______________________________

Date of Visit: ______________________________

Code - Circle one of the following in column at right:

A - Commendable
B - Adequate
C - Needs improvement

Observations:	Comment
1. General attitude of management and employees.	A B C
2. Attitude of management toward cooperative training program.	A B C
3. Attitude of workers toward each other.	A B C
4. Interest of management in part-time employees.	A B C
5. Availability of a variety of quality work experience.	A B C
6. Accessibility of business.	A B C
7. Satisfactory working hours.	A B C
8. Safe and sanitary working conditions.	A B C
9. Appearance of employees.	A B C

10. Other comments: ______________________________

PHASE VI - SELECTION OF TRAINING STATIONS

Checklist No. 2 - Selection of Cooperating Firms

Objective: To select cooperating firms which can provide quality training experiences.

Suggested Activities:

_____ 1. Follow up those firms which indicated a desire to cooperate in the program, but who were undecided at the time of the initial contact.

_____ 2. Evaluate information from training station assessment forms and select those firms best suited for participation in the program.

3. Utilize one of the following methods in notifying those firms selected:

_____ a. Write a letter.

_____ b. Make a personal visit.

_____ c. Phone management representative.

Note: Indicate that firm will be utilized unless more stations than students are available.

_____ 4. Notify those firms not selected which might be considered as future cooperating firms. Write, telephone, or make a personal visit.

PHASE VII

PLACEMENT OF STUDENT

PAGE

1. Student Selection of Career Objective 55

   A. A Self-Appraisal Unit 56

2. Preparation for Employment Interviews 62

   A. Your Do's and Don'ts 63

   B. Role Playing 64

   C. Interviewer's Evaluation Form 66

   D. Procedure for Completion of Application Form 67

   E. Introductory Letter 68

3. Placement of Students at Cooperative Training Stations .. 69

4. Development of Training Plan and Memorandum 70

PHASE VII - PLACEMENT OF STUDENT

Checklist No. 1 - Student Selection of Career Objective

Objective: To assist students in career selections through self-analysis.

Suggested Activities:

_____ 1. Direct students to complete A Self-Appraisal Unit.*

_____ 2. Require students to complete information about themselves. This should include data sheet, example of a business letter, etc. Have information attractively arranged to be used during the interview.

_____ 3. Schedule a conference with each student to discuss his strengths and weaknesses as they related to career selection. (This could be done as a group process)

Forms:

A - A Self-Appraisal Unit *
*Adapted from: Material developed by Department of Education, St. Louis Park High School, Minneapolis, Minnesota.

Phase VII - Checklist No. 1 - Form A

Form A - A SELF-APPRAISAL UNIT*

WHAT I AM TODAY
MY WORK EXPERIENCE AND INTERESTS

Complete form below by listing work experience and likes and dislikes of each job.

Job:	Things I disliked about it	Things I liked about it
Firm: ____________ Dates: ____________ Positions: ____________		
Firm: ____________ Dates: ____________ Positions: ____________		
Firm: ____________ Dates: ____________ Positions: ____________		
Firm : ____________ Dates: ____________ Positions: ____________		

What I liked and disliked above might affect my choice of vocation. How can my work experience help me in choosing my vocation? ____________

____

Do you like to work with people or things? Why? ____________

____

---

*See page 54 for acknowledgment.

Phase VII - Checklist No. 1 - Form A - Continued

AN APPRAISAL OF MY APTITUDE

Listed below are selected areas of ability or aptitude. (Try not to confuse "Interest" with "Aptitude". Interest means what you like or dislike. Aptitude means your capacity for success in a given area in which you receive training.) On the right are three degrees of ability. Consider each ability individually and check the degree you believe you possess.

AREA OF ABILITY	DEGREE OF ABILITY		
	Below Average	Average	Above Average
1. Physical			
a. Strength (carrying)	______	______	______
b. Coordination	______	______	______
2. Manual (hand & finger dexterity)	______	______	______
3. Mechanical (Change ribbons)	______	______	______
4. Clerical (Speed and accuracy with detail, numbers, names, etc.)	______	______	______
5. Executive (Leadership)	______	______	______
6. Social (ability to get along with others at work and play)	______	______	______
7. Musical	______	______	______
8. Artistic (creativity)	______	______	______
9. Mental			
a. VERBAL-MEANING-ability to understand ideal expressed in words	______	______	______
b. SPATICAL-ability to think about objects in two or three dimensions	______	______	______
c. REASONING-ability to solve problems logically	______	______	______
d. NUMERICAL -ability to work with numbers rapidly and accurately	______	______	______
e. WORD-FLUENCY--ability to write and talk easily	______	______	______
f. MEMORY-ability to recall past experiences	______	______	______

Which are three stongest areas? (Use #'s 1 - 9) ______ ______ ______

Which are three weakest areas? (Use #'s 1 - 9) ______ ______ ______

How might this knowledge affect your choice of vocation? ____________________

____

____

MY WORK HABITS

Answer YES (letter perfect habit), SO-SO, or NO (poor habit) in the Answer column and enter the score in Score column. Each YES is 3 points, each SO-SO answer is 2 points, and each NO answer is 1 point.

STARTING THE WORK PERIOD DO YOU:	ANSWER	SCORE
1. Attend class regularly and consider the class important?	______	______
2. Leave coats, chewing gum, boyfriends and girlfriends, and other unnecessary items outside the classroom?	______	______
3. Arrive at class in time or even a few minutes early with no loitering at the door?	______	______
4. Enter the room quietly?	______	______
5. Have with you all materials (paper, pencil, thinking caps, etc.) needed for the day's work? Are you a self-sufficient unit so that you do not have to borrow from your neighbor?	______	______
6. Come to class appropriately dressed and well groomed?	______	______
7. Be prepared to take an active part in learning activities?	______	______
8. Stop talking at the bell without being told, and avoid unnecessary talking during the hour?	______	______
WORKING HABITS DURING THE PERIOD DO YOU:		
9. Devote your full attention to the class--put aside your outside interests for the full time of the class?	______	______
10. Feel reponsible for your behavior and performance in the classroom so that you always have your "best foot forward"?	______	______
11. Listen carefully, quietly, and courteously to instructions?	______	______
12. Do all work carefully and according to directions?	______	______
13. Make your own decisions about routine matters and assignments?	______	______
14. Think while you work, so that obvious errors do not slip by?	______	______

Phase VII - Checklist No. 1 - Form A - Continued

	ANSWER	SCORE
15. Use your initiative and adapt well to changes in classroom procedure or in assignments?	______	______
16. Participate in discussion and learning?	______	______
17. Feel responsible for producing an acceptable, finished product?	______	______
18. Strive for high standards of performance?	______	______
19. Turn in neatly done papers?	______	______
20. Try always to do satisfactory work rather than to try always to find satisfactory excuses for not doing the work?	______	______
21. Work until the end of the time without reminders?	______	______
22. Turn in work before the deadline?	______	______
23. Realize that you are dismissed by the teacher, not by the clock?	______	______
24. Make sure your desk or work area is in good order before leaving the room?	______	______
25. Always return books and borrowed materials to the proper place?	______	______
26. Leave the room the way you entered--quietly?	______	______
27. Show respect for school and personal property, both yours and that belonging to others?	______	______
28. Never behave in an annoying manner; are you always courteous, cooperative, and businesslike while in the classroom?	______	______
29. Show respect for classmates?	______	______
30. Display traits employers look for in a beginning worker such as dependability, reliability, honesty, efficiency, loyalty, perseverance, and cheerfulness?	______	______
31. Refrain from chewing gum in class?	______	______
32. Remain calm, cool, and collected under pressure?	______	______
33. Zealously guard your reputation as an industrious student?	______	______
	TOTAL:	______

MY AUTOBIOGRAPHY

A. FAMILY INVENTORY

Name ______________________________ Date of Birth __________

Address ____

Father's Name ______________________________ Birthplace __________

Father's Occupation ______________________________ Firm __________

Mother's Name ______________________________ Birthplace __________

Mother's Occupation ______________________________ Firm __________

Number of brothers younger than you: ______________________________

Number of brothers older than you: ______________________________

Number of sisters younger than you: ______________________________

Number of sisters older than you: ______________________________

B. Describe those things in your past or present life which will make your autobiography a more complete history of you. You will want to include any experience or influence which has affected your personality, interests, or problems. (Use backside of this sheet if necessary)

C. Discuss briefly your vocational plans for the immediate future and for life. If your plans are still indefinite, discuss some of the problems you are facing in making your decision.

Phase VII - Checklist No. 1 - Form A - Continued

MY EXTRACURRICULAR ACTIVITIES AND INTERESTS

CLUBS AND ORGANIZATIONS

Include length of membership, record of participation, offices held, etc.

Organization	Things I dislike about it	Things I like about it

SOCIAL LIFE

HOBBIES, MAGAZINES, TRAVEL, ETC.

Do you see any pattern in your likes and dislikes? How can an understanding of the likes and dislikes listed above help you in selecting your vocation?

PHASE VII - PLACEMENT OF STUDENT IN COE

Checklist No. 2 - Preparation for Employment Interviews

Objective: To prepare students to perform effectively during employment interviews.

Suggested Activities:

_____ 1. Students should study the do's and don'ts listed on Form A prior to the initial interview.

_____ 2. Plan role playing activities of interview situations by students. See Form B and C.

_____ 3. Alert students to the fact that they must be prepared to take skill tests such as dictation, transcription, and typewriting production. They need important, necessary tools such as pen, typewriting eraser, pocket pad for recording information.

_____ 4. Stress the importance of completing the application form. Refer to Form C and D.

_____ 5. Select students to be interviewed for each station and have them make an appointment for the interview. This may be done by writing a letter of application or by telephone.

_____ 6. Complete introductory form for each student-learner after he has received confirmation of the interview. See Form D.

_____ 7. After the interview, suggest that the student write a summary of what took place. Have the student write a letter to the interviewer and express appreciation for the consideration and courteous treatment received.

Forms:

A - Your Do's and Don'ts

B - Role Playing

C - Interviewer's Evaluation Form

D - Procedure for Completion of Application Form

E - Introductory Letter

Phase VII - Checklist No. 2 - Form A

Form A - YOUR DO'S AND DON'TS

Your objective during the interview is to convince the interviewer that you are the person he should hire. You can accomplish this by demonstrating maturity, self-assurance, poise, interest, and knowledge of what is preferred behavior in a business office. Here is a list of do's and don'ts for your guidance and direction.

DO'S:

a. Arrive on time; telephone if you are unavoidably delayed.
b. Stress your qualifications for the job and your interest in it.
c. Be businesslike and brief.
d. Provide information asked for. Have credentials up to date.
e. Let the interviewer take the lead in conversation.
f. Talk in terms of specific jobs, rather than saying, "I'll take anything."
g. Make certain you understand what is required of you before you are hired.
h. Be realistic in discussing wages--be familiar with the prevailing wage scale for the position you seek.
i. Dress appropriately.
j. Act natural.
k. Listen very carefully to the interviewer.
l. Ask sensible questions.
m. Make yourself understood.
n. Think of your potential service to the employer.
o. Know reasons for entering your profession.
p. If you are to follow up, get telephone numbers, names, and addresses.
q. Thank the interviewer for his/her time as you leave.

DON'TS:

a. Play with articles of clothing, gloves, or purse during the interview.
b. Smoke or chew gum during the interview--decline if you are invited to smoke.
c. Interrupt the interviewer while he is talking.
d. Criticize former employers--if you can't say something constructive, say nothing.
e. Make salary the main theme of your conversation.
f. Mention your personal, domestic, or financial problems.
g. Be too disappointed if you don't get the first job you seek.
h. Freeze or become tense.
i. Come unprepared.
j. Miss your interview.
k. Evaluate yourself.
l. Present exaggerated appearance.
m. Talk too much or too little.
n. Try to be clever or funny.
o. Make elaborate promises.
p. Become emotional.
q. Become impatient.
r. Oversell your case.
s. Over-emphasize rewards.
t. Prolong interview.
u. Give undue consideration to a starting salary.
v. Suggest how the employer should run the business.

Phase VII - Checklist No. 2 - Form B

Form B - ROLE PLAYING

SUGGESTIVE QUESTIONS FOR INTERVIEW ROLE PLAYING ACTIVITIES

I. The questions have been arranged under the different areas of interest to the interviewer for securing information.

A. Recreational activities and interests

1. What special things do you like to do in your spare time?
2. Do you prefer to be with friends or alone in doing the above activities?
3. Would you prefer being a leader or a follower?
4. Do you like to read fiction or non-fiction?
5. What are some of your favorite stories?
6. If you could choose a movie, which type would appeal to you most?
7. What are your hobbies?

B. Vocational ambitions and work history

1. What three occupations would you be most interested in? Why?
2. Have you ever known or admired someone in these occupations?
3. What is your father's occupation?
4. What is your family going to do to help you in your ambition?
5. What are your parents' opinions of the part-time training program offered by the school?
6. Do you work after school?
7. What work have you done in the past?
8. What is your present job, and how many hours do you work each week?
9. How much do you earn and what do you do with the money you earn?
10. Do you like the work?
11. What is your knowledge of the materials handled and other aspects of your chosen vocation?
12. Do you understand the skills necessary to perform the duties of your chosen vocation?
13. Do you possess these skills?
14. Why did you start working?

C. Companionship

1. Do you prefer to be alone or with other people?
2. Which clubs do you belong to?
3. Do you hold any office in these clubs?
4. Do other students pick on you at school?

Phase VII - Checklist No. 2 - Form B - Continued

5. Who is your best friend?
6. What do you talk about?
7. Do you believe other students like or dislike you?

D. Attitude toward school

1. What is your favorite study?
2. Which study have you like least while in high school?
3. What are your plans after you leave high school?
4. Do you plan to go to college? Why?
5. How do you feel about high school discipline regulations?
6. In what way would you like to have school different from what it is?

E. Attitude toward one's own health and personality

1. Will you describe how you feel about your personality?
2. Have you sometimes thought of ways you would like to be different than you are?
3. Have you tried to carry out these ideas?
4. Will you tell me about any illness you have had?
5. Do you have fears which sometimes cause you to worry?
6. Would you tell me a little about these worries?

F. Attitude toward self

1. If you were given three wishes for whatever you desired, what would you wish for?
2. If you had $10,000 what would you do with it?
3. What is your vision of the future for yourself?
4. Who is your ideal person? Why?

Phase VII - Checklist No. 2 - Form C

Form C - INTERVIEWER'S EVALUATION FORM

INTERVIEWER'S CHECKLIST

Name ____________________ Date ______________ Hour ________

Physical appearance ______________________________

Grooming ______________________________

General attitude ______________________________

Dependability ______________________________

Intelligence ______________________________

Initiative ______________________________

Leadership ability______________________________

Other personality traits (maturity, poise, etc.) ____________

____

Date of Employment ____________ Test Results ____________

Full-time ______ Part-time ______ Extra ____________

Department ______________________________

Position ______________________________

Salary ______________ Date ________ Approved __________

General remarks ______________________________

____

____

____

To be used by students during role playing activities.

Phase VII - Checklist No. 2 - Form D

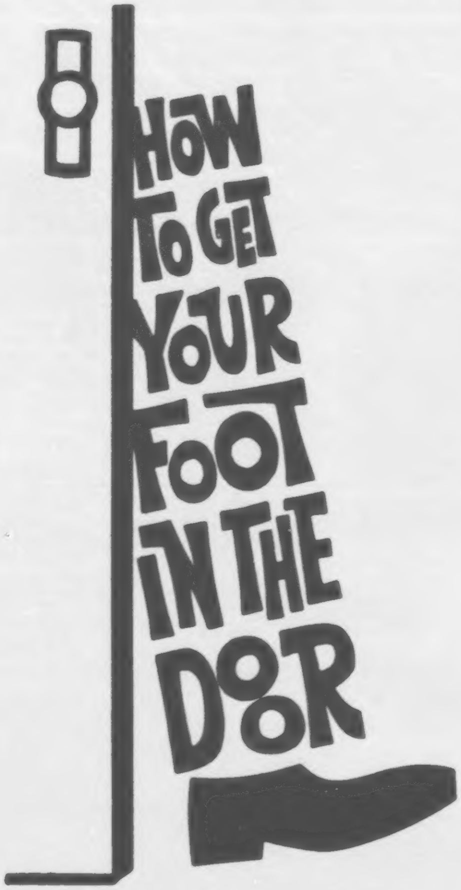
Form D - PROCEDURE FOR COMPLETION OF APPLICATION FORM

Prior to or after the interview, you will probably be asked to complete an application form. Completing the form as directed is one test of your intelligence. The time it takes you to complete the items and the completeness of your answers could be significant.

The neatness of the completed application form creates the first impression on the employer. Use a typewriter unless you are directed to complete it in your own handwriting.

Study the form carefully and follow directions exactly, as accuracy is also important. If it asks for your last name first or that your name be printed, be sure you do as directed. Be brief and honest in answering all the questions. Misspelled words create a poor impression and indicate carelessness or lack of general ability.

After completing every item, review the entire form. Be sure that all blanks have been filled in and that instructions have been followed.



Phase VII - Checklist No. 2 - Form E

Form E - INTRODUCTORY LETTER

OFFICE OCCUPATIONS PROGRAM

To: ____

Business: ____

This will introduce __________________________________ who is enrolled in the Office Occupations Program. This prospective student-learner is one out of _____ who will be sent to apply for a starting position with your company to pursue a career objective of ______________________.

I will appreciate the opportunity of reviewing the interview with you prior to the final decision.

____
Coordinator, Office Occupations
High School

Telephone: __________ (Office)

Telephone: __________ (Home)

PHASE VII - PLACEMENT OF STUDENT

Checklist No. 3 - Placement of Students at Cooperative Training Stations

Objective: To place students at cooperative training stations suited to their capabilities.

Suggested Activities:

_____ 1. Begin on-the-job training in September, if possible.

_____ 2. Attempt to match student with training stations available.

_____ 3. Assist employer is selecting student-learner by sending more than one suitable trainee for interview. Although the interview method is recommended, selection may be made by the coordinator.

_____ 4. If possible, arrange interviews for students with more than one potential training station.

_____ 5. Request oral interview reports from students and from training sponsors after the interview.

_____ 6. After careful study, arrange final placements. These conditions should be achieved:

  _____ a. Student's interests and abilities match the job and its opportunities.
  _____ b. Training station is satisfied with the student.
  _____ c. Student is satisfied with the opportunities offered at the training station.
  _____ d. Coordinator is satisfied with the training plan and possibilities offered for the students' development toward career goals.

_____ 7. Complete memorandum of training plan and have signed by all interested parties. File in student's folder with copy sent to the employer. See Appendix A, Training Supervisors Handbook for Training Agreement, Memorandum of Training Plan, and Cooperative Work Agreement.

PHASE VII - PLACEMENT OF STUDENT

Checklist No. 4 - Development of Training Plan and Memorandum

Objective: To effect an understanding of quality training requirements through the development of a training plan and memorandum.

Suggested Activities:

_____ 1. Discuss with each employer and each student-learner the step-by-step training plan to meet the student's career objective. See Appendix A.

_____ 2. From the above discussion prepare a training plan to be used by each student-learner and training supervisor.

SAVINGS
SAVINGS ACCOUNT
©VOLK

PHASE VIII

PUBLIC RELATIONS

PAGE

1. Nature and Role of a Public Relations and Promotional Program 71
    - A. Nature and Role of a Public Relations and Promotional Program 72

2. Development of Specific Public Relations and Promotional Activities 73
    - A. A List of Specific Promotional Activities 74
    - B. Utilization of News Releases 75
        - (1) Preparation of the News Release 76
        - (2) Sample News Release 77
    - C. Development of Specific Public Relations and Promotional Activities 78
    - D. Illustrated Bulletin Board 81
        - (1) Illustrated Bulletin Board 82
    - E. Development of a Promotional Brochure 83
        - (1) Six Page Fold-Out Brochure 84
        - (2) Illustrated Brochures 85
    - F. Certificate of Participation in COE Program 89

PHASE VIII
Public Relations

PHASE VIII - PUBLIC RELATIONS

Checklist No. 1 - Nature and Role of a Public Relations and Promotional Program

Objective: To develop an understanding of the nature and role of a public relations program.

Suggested Activities:

_____ 1. Study Form A, The Nature and Role of a Public Relations and Promotional Program.

Innovative Activities:

_____ 1. Complete supplementary readings on the nature and role of a public relations program. See Bibliography.

Keep
The Public
Informed
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Form:

A - Nature and Role of a Public Relations and Promotional Program

Phase VIII - Checklist No. 1 - Form A

Form A - NATURE AND ROLE OF A PUBLIC RELATIONS AND PROMOTIONAL PROGRAM

Role of Public Relations Program

To a marked degree, the success of a work experience program depends upon the effectiveness of a well planned public relations and promotional program. It is important to consider the program as encompassing those people within the educational structure (administrators, students, and secretaries) as well as those in the business and public community.

Specific purposes for a public relations and promotional program would include the following:

1. To develop an understanding of the nature and objectives of the office education program.
2. To develop an understanding of the program operation.
3. To build prestige for the program.
4. To establish rapport with the public for support of the program.
5. To motivate those personnel who are actively supervising and administering the program in the school and business community.

Nature of a Public Relations Program

Competition for the attention of the public is extremely keen. In order for any organization to tell and to promote its story to the public, promotional efforts must be well planned and executed. The Calendar of Events in Phase II includes those activities which are a part of a continuous public relations program.

Specific information about the complete program must be disseminated well in advance of registration or class scheduling time in high school. The informational phase of this program will continue until the school term terminates in the spring.

Checklist No. 2 - Development of Specific Public Relations and Promotional Activities

Objective: To develop an effective public relations and promotional program for office education.

Suggested Activities:

_____ 1. Study Form A, A List of Specific Promotional Activities.

_____ 2. Refer to the Calendar of Events in Phase II, Checklist No. 1, Form D for various activities.

_____ 3. Utilize news releases. Refer to Forms, B, B-1, and B-2.

_____ 4. Use effective speech presentations. Refer to Form C.

_____ 5. Plan a bulletin board display. Refer to Forms D and D-1.

_____ 6. Use educator's guide to free films.

_____ 7. Formulation of brochure. Refer to Forms E, E-1, and E-2.

_____ 8. Present employer with certificate indicating employment of a student-learner. See Form F.

Forms:

A - A List of Specific Promotional Activities

B - Utilization of News Releases

B_1- Preparation of the News Release

B_2- Sample News Release

C - Promotional Speech Presentation

D - Illustrated Bulletin Board

D_1- Illustrated Bulletin Board

E - Development of a Promotional Brochure

E_1- Six Page Fold-Out Brochure

E_2- Illustrated Brochures

F - Certificate of Participation in COE Program

C.O.E.
Meeting
Today

Phase VIII - Checklist No. 2 - Form A

Form A - A LIST OF SPECIFIC PROMOTIONAL ACTIVITIES

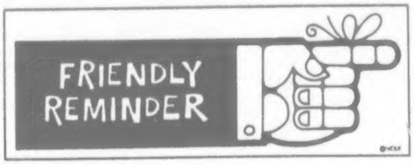
The purpose of this form is to serve as a checklist to determine what specific activities are to be used in promoting the office education program. As many of the following activities as possible should be selected and utilized sometime during the current year. Check those activities to be considered for implementation during the current year.

GENERAL TYPES OF PROMOTIONAL ACTIVITIES

_____ Preparation and Distribution of Brochures
_____ Radio - Spot Announcements, Interviews
_____ News Releases - Radio, Television
_____ Newspaper News Items, Editorials, Feature Stories

SPECIFIC COMMUNITY PROMOTIONAL ACTIVITIES

_____ Invitation to Outsiders to Visit Office Education Classes
_____ Distribution of Bulletins About Office Education Program
_____ Invitations to Sponsors as Guests at Office Education Banquet
_____ Utilization of Community Resource People at O.E. Clubs and Classes
_____ Conduct Survey of Community Adult Training Needs
_____ Speak at Service Club Meetings
_____ Promotional Exhibit in Store Window
_____ Exhibits at P.T.A. and other Community Meetings
_____ Talks Presented by Student at Community Meetings
_____ Invitation to Participate on Steering or Advisory Committee
_____ Publication of Coming Special Events
_____ Follow-up News Releases on Special Events
_____ Displaying Exhibits, Posters, and Charts about Office Education Program
_____ Distribution of Office Education Activity News Bulletin
_____ Distribution of Career Information Literature
_____ Announcements about Office Education in Faculty Bulletins
_____ Representation of Office Education in the School Yearbook
_____ Assistance of Office Education Students in School Projects
_____ Displaying Floats at Homecoming Parade
_____ Participation of Coordinator at Student's Assembly Program
_____ Particpation of Students at Student's Assembly Program
_____ News Releases about Office Education in the School Newspaper
_____ Speak to Typewriting and Shorthand Classes



Phase VIII - Checklist No. 2 - Form B

Form B - UTILIZATION OF NEWS RELEASES

General Information

The main purpose of news releases is to inform the readership of the office education program and its activities. Many advantages of using news releases are apparent, but perhaps the most important are:

1. They are free or relatively inexpensive in most cases.
2. They can be prepared quickly.
3. They have a wide range of publicity coverage.

Public information media available for use by the coordinator include newspaper, radio, and television stations. It must be understood that media personnel must evaluate information made available to them and utilize that what is of greatest importance to the readers. However, most news editors and media directors are interested in securing news items of an educational nature.

Daily News
HOMETO

Phase VIII - Checklist No. 2 - Form B_1

Form B_1 - PREPARATION OF THE NEWS RELEASE

Of the information media available, newspapers will provide the most commonly used vehicle for telling the story of office education. A definite procedure used in the formation and dissemination of news will insure greater effectiveness of releases to public information media. The following procedure is suggested:

_____ 1. Determine the purpose of the news release prior to writing the article.

_____ 2. Organize the main points to be covered in the article in a logical sequence.

- a. All news stories are written in order of decreasing importance.
- b. The first paragraph, called the lead paragraph, should contain the five "W's" and an "H". (Who? What? When? Where? Why? and sometimes How?)
- c. The next most important fact after the lead is placed in the first paragraph of the body.
- d. Include one idea or sub-topic in each paragraph.
- e. Keep paragraphs short but vary length so short paragraphs are not sequential.
- f. Use repetitious synonyms, referece to above paragraphs, and elaboration of detail in logical sequence as transitional devices.
- g. Begin each paragraph with a significant and interesting fact.
- h. Use simple everyday language.
- i. Be concise and avoid editorializing.
- j. Three characteristics of every newspaper story are:
  - (1) it must be factual,
  - (2) it must be interesting, and
  - (3) it must be of interest to a number of readers.

_____ 3. Type the information in good typewritten news-release form.

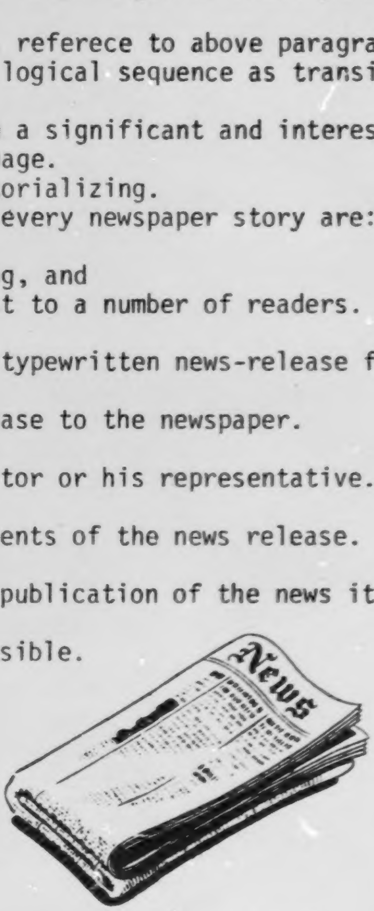
_____ 4. Personally take the news release to the newspaper.

_____ 5. Introduce yourself to the editor or his representative.

_____ 6. Indicate the purpose and contents of the news release.

_____ 7. Show appreciation concerning publication of the news items.

_____ 8. Utilize pictures whenever possible.



Form B_2 - SAMPLE NEWS RELEASE

ANNUAL OFFICE EDUCATION COORDINATOR CONFERENCE IS HELD

On August 17-21, 19--, The Annual Office Education Teacher Coordinator Conference was held at the Holiday Inn of Bismarck. Mr. Carrol E. Burchinal, President of the North Dakota Office Education Coordinators' Association, introduced the coordinators. Reuben T. Guenthner, State Director of Vocational Education, welcomed the group. Mr. Norbert Mayer, Program Director, spoke on "Program Development for the Disadvantaged Youth". Mr. Jim Volk, Chairman, Mary College, Bismarck, addressed the group on "Life's Biggest Bite." Mr. John Lee, State Supervisor of Business and Office Education from the state of Indiana, explained the "Model Office" concept used in Indiana. Mrs. Rosemary Fruehling, Special Consultant, Gregg Division, McGraw-Hill Company, enlightened the group for the second year by speaking on "Cooperative Education".

Dr. John Peterson, Chairman of the Business Education Department of the University of North Dakota, and Doris Slaaten, Professor of Business Education, Minot State College, told the group about their work on Exemplary Programs. Mrs. Rose Ward, C.P.S., and Miss Patricia Bosch, C.P.S., clarified the requirements for becoming a C.P.S. Mr. Ralph Lange, State Director, North Dakota State Employment Service, Bismarck, spoke on "Merchandising Job Talents". Mr. Ray Shields, Director, Capitol Commercial College, Bismarck, and Mr. R.C. Hadlich, President, Aakers Business College, Grand Forks, spoke on "Business Colleges". Mr. Jerald B. Lydeen, State Supervisor of Office Education, Bismarck, spoke to the group and clarified questions from the floor.

A reception was provided by Gregg Company before the banquet for coordinators.

Phase VIII - Checklist No. 2 - Form C

Form C - PROMOTIONAL SPEECH PRESENTATION

VOCATIONAL OFFICE EDUCATION

I am grateful for the opportunity to speak to you about vocational office education. This topic is of vital concern to all of us, particularly those of us in the educational and business community.

The need for vocational education in the office occupations is increasing at a rapid rate. Of the 76 million people currently employed, approximately 16 million, or about one in every four workers, are engaged in office occupations. In the 1980's a greater proportion of these people will be employed in office jobs. The need for trained office workers will continue to expand beyond the current rate of demand.

Locally supported vocational office education programs have been offered for many years in secondary schools. With the passage of the Vocational Education Act of 1963 and later with the passage of the Vocational Education Amendments Act of 1976, federally reimbursed vocational education programs are now planned to fulfill the present and future job requirements of the business community. This act gave particular emphasis to office education which had not been included in previous aid to vocational education legislation. There are now office education federally supported programs at the secondary level in North Dakota.

The Board of Education is about to implement a new cooperative office education program in our high school. As business and professional people, many of you will be invited to become a vital and integral part of this program. In fact, the degree to which this program is successful will be dependent to a great extent on the cooperation of the business community.

Those of you who are engaged in business will be quick to agree that one must always be looking for ways to increase efficiency in operations to maximize or improve service. This, in effect, is what the office education program will be helping to achieve.

One of the primary objectives of the office education program is to utilize the business community as a training laboratory. Here, students will apply those skills already developed in school, develop new skills and attitudes, and learn actual procedures utilized in office operations. The program is designed primarily for students who will be entering the job market upon graduation from high school and is, therefore, vocational in nature. It will be limited to qualified students who have senior status.

Through counseling and selection, those students with the necessary basic skills and interests to enter the program will be identified. Also, business and service enterprises with potential training stations in the community will be identified and invited to participate. An attempt to match the student with the station will be made, but the final selection and choice of student-learner will remain with the cooperating firm.

The program is planned specifically to orient the student to the broad spectrum of business activity. Each student will be given individual instruction in his career field and group instruction in areas of general business knowledge. Individual units are planned specifically to aid each student in meeting his chosen career goal. Learning occurs both in the classroom through specific instruction and on the job where the employer provides detailed instruction and supervision. In addition, students will complete the regular required basic courses for graduation in addition to the office education program.

My role, as teacher, is to teach the related classes and as the office coordinator, to relate the classroom work to each student's job and career objective with the assistance of the individual training station supervisor. Thus, we cooperate by determining the skills and knowledges which are required for job competency during future employment. This cooperative effort will lead to fulfillment of the student's career objective.

In communities where this program has been in operation, it has been found that students in the program have excellent attendance records and their school work has taken on a new and important meaning. As they successfully achieve at the training station, they become ready to accept more responsibility as they gain confidence in themselves.

It is commendable that many of our professional business men have already agreed to participate in the program because of their interest in educating the youth of our community. However, let me say that the cooperative program holds many responsibilities as well as benefits for the employer.

As a cooperating firm, you will be the first to observe the part-time student-learner; the first to train him according to your own procedures and methods, and the first to hire him upon graduation if you so desire. By obtaining well trained personnel, you reduce the turn-over of beginning office workers. You can supplement your present training programs and reduce your costs of recruiting and training.

We are caught up in an age of revolutions, one of which is in the education and training of our youth. A specific area of concern to business and education is their cooperative relationship in training and development of potential workers. Employers have recognized the fact that one way to produce a more competent office worker is to have the business community provide students with practical experiences and situations which are impossible to duplicate in the classroom. Such a partnership can be effectively provided by cooperative office education.

Advantages of cooperative education programs were stated by Mr. John Marsh, Director General of the British Institute of Management, Great Britian, Phase VIII - Checklist No. 2 - Form C - Continued

when he spoke to the American Management Association. He made the point that development must come through the individual himself. He set down a standard for executives such as yourself and those you serve. I feel these guidelines can be used as goals in the cooperative office education program. Students can adopt and strive to meet these objectives:

1. Growth - A student has a job in which there is a chance of continued growth in knowledge and experience.
2. Skills - A student has a job in which skills can be improved and in which new skills can be learned, when necessary.
3. Achievement - A student has a job in which one has a sense of achievement from time to time. Money does not necessarily bring achievement.
4. Loyalties - A student has a job in which the meaning of loyalties to his profession or trade, to his family, employer, and fellow workers are known.

This has been a brief introduction to the Cooperative Office Education Program we are planning to implement. I have some brochures which I hope might clarify any questions you might have. Should any of you here today be interested in discussing this program in further detail, I will be pleased to see you after this meeting. I can also be reached at __________ High School and would be happy to set a time to call at your office at your convenience.

In closing, let me promise you that if you choose to participate in this program, you will not only be helping yourself, your community, and business in general; but, some young person achieve in his pursuit of gainful employment in the world of work.

Thank you.

Phase VIII - Checklist No. 2 - Form D

Form D - ILLUSTRATED BULLETIN BOARD

VOCATIONAL
OFFICE
EDUCATION
IS ON THE
MOVE

DO YOU QUALIFY FOR ENTRANCE INTO ONE OF THESE EXCITING CAREERS?

SECRETARIAL - CLERICAL

TRANSCRIBING-MACHINE OPERATOR
DUPLICATING-MACHINE OPERATOR
SECRETARY
CLERICAL SECRETARY
TYPIST
CORRESPONDENCE CLERK
FILE CLERK
WORD PROCESSOR

ACCOUNTING AND RELATED FIELDS

ACCOUNTANT
AUTOMATIC DATA-PROCESSING
  EQUIPMENT OPERATOR
DATA ENTRY OPERATOR
ACCOUNTANT-MACHINE OPERATOR
PAYROLL CLERK
STENOGRAPHER

Directions for Construction:

1. Use a solid color for background.
2. Use contrasting color for lettering.
3. Select attractively colored picture depicting one of the positions noted.

Phase VIII - Checklist No. 2 - Form D_1

Form D_1 - ILLUSTRATED BULLETIN BOARD

PLAN NOW FOR THE FUTURE

FACTORS TO CONSIDER IN JOB SELECTION:

1. JOB SATISFACTION
2. WORKING CONDITIONS
3. INCOME
4. FRINGE BENEFITS
5. JOB PREPARATION
6. JOB APTITUDE

"IT'S YOUR ATTITUDE, NOT YOUR APTITUDE,
THAT WILL DETERMINE YOUR ALTITUDE!"

Phase VIII - Checklist No. 2 - Form E

Form E - DEVELOPMENT OF A PROMOTIONAL BROCHURE

Examples of two brochures explaining the cooperative office education program is presented on the next succeeding pages.* In the formulation of this brochure, the following content was considered important:

1. Explanation of cooperative education.
2. Purposes of program.
3. Basic operation of the program.
4. Selection of students.
5. Curriculum content.
6. Role of cooperating firm.

Emphasis was placed on constructing a brochure which would fulfill the following objectives:

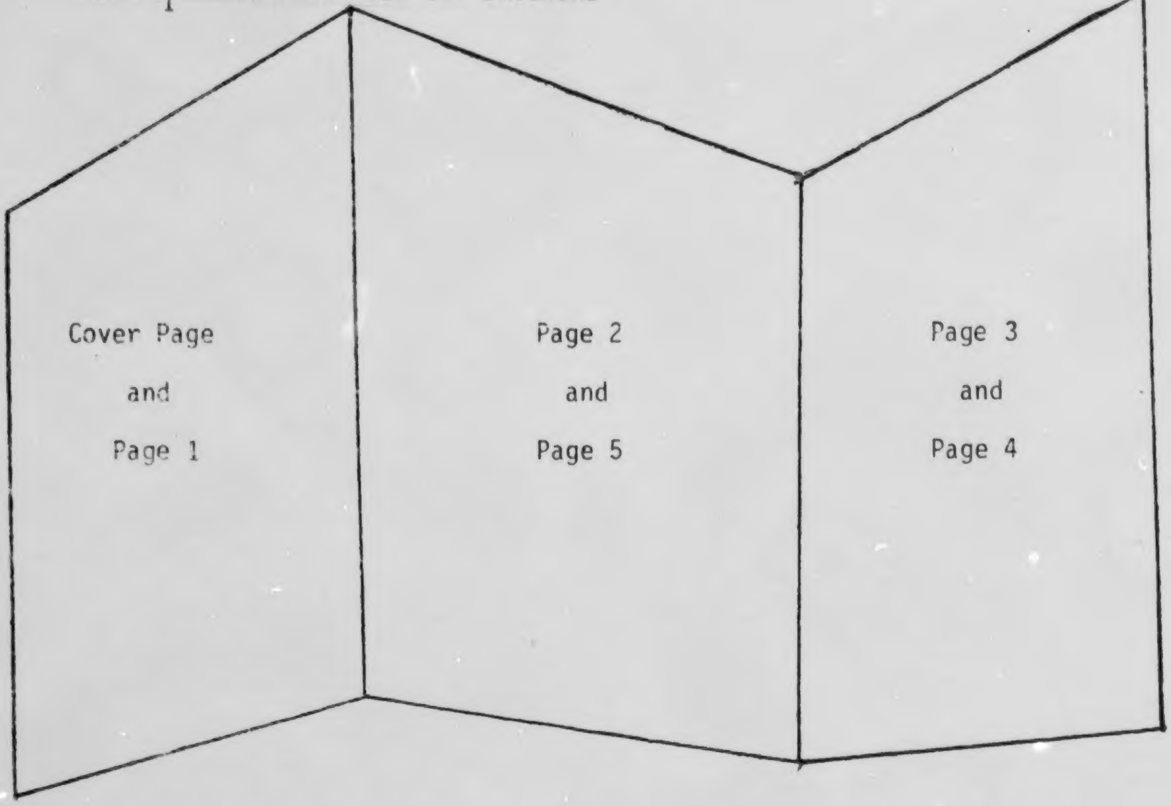
1. Be clear, concise, and definite in its presentation.
2. Orient firm as to the overall concept of cooperative education.
3. Be attractive in appearance.

---

* Developed by Roberta Talcott (Brochure A) and Mary Hedberg (Brochure of Minot State College, Minot, ND, 1980.

Phase VIII - Checklist No. 2 - Form E_1

Form E_1 - SIX PAGE FOLD-OUT BROCHURE



Cover Page

Illustration depicting an office activity

First Page

What is the Vocational Office Education Program?
What are the main goals of the program?

Second Page

What are the advantages to the employer?
What are the advantages to the student?

Third Page

What are the qualifications of the firm to participate in the program?

Fourth Page

Implementation of the program.

Fifth Page

Illustration and summary.

Phase VIII - Checklist No. 2 - Form E-2
Form E-2 - ILLUSTRATED BROCHURES
Brochure A

AVAILABLE PROGRAMS

SECRETARIAL

This student must have taken one year of typing, one semester of office machines, one year of shorthand, one year of bookkeeping or one semester of recordkeeping. The students must be presently enrolled in Shorthand II and Secretarial Practice.

CLERICAL

This student has taken one year of typing, one year of bookkeeping, and one semester of office machines. They must be currently enrolled in Clerical Practice.

BOOKKEEPING

This student has one year of typing, one year of bookkeeping, and one semester of office machines. They must be presently enrolled in Bookkeeping II.

COORDINATOR DUTIES

Assist in the selection of students with the skills, abilities, and interests necessary for successful entrance into office positions.

Contact employers, explain the training program, and secure training stations.

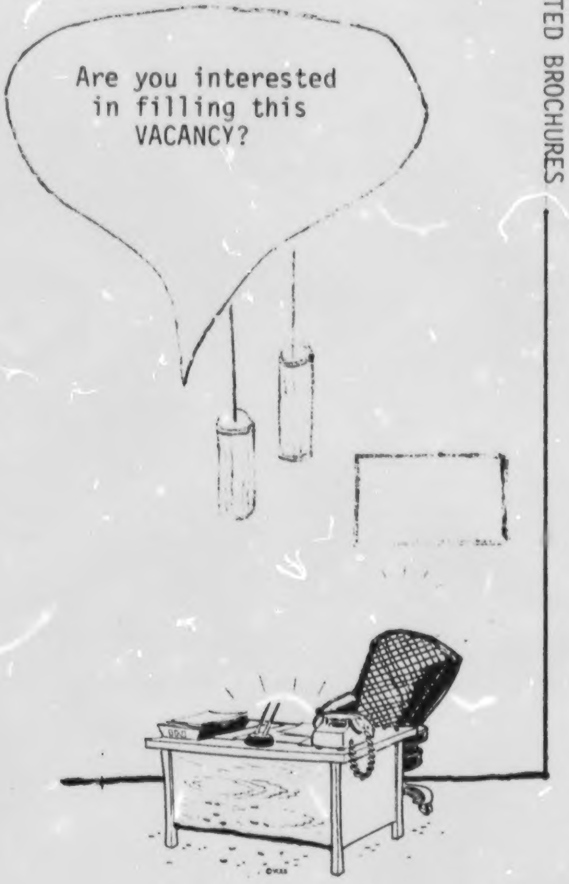
Teach the Office Education Class.

Coordinate the training of students through conferences with employers by visits to the training stations.

Counsel the students and give guidance concerning office occupations.

If you are interested or would like further information, please feel free to contact the Office Education Coordinator.

OFFICE EDUCATION


Are you interested in filling this VACANCY?

VOCATIONAL OFFICE EDUCATION

Office Education is a cooperative business education program in which the school provides training in business skills and occupational information. The business community provides a laboratory in which the pupil practices these skills and acquires additional skills and information.

The laboratory experience is taken in a local office at a time that is convenient for both the employer and the student. Students will take their regular high school courses, including Office Education.

OBJECTIVES

- To aid the students in developing skills and acquiring information applicable to all office occupations.
- To help the student acquire specialized skills and information required for successful employment in the office in which they are placed.
- To provide laboratory experience in the form of a real job situation in the local community which will enable the students to become aware of the requirements of the business.
- To provide training that will enable the students to advance to higher levels of employment with an understanding of a democratic economic society.

STUDENT ADVANTAGES

Receives the assistance of the employer through an education program to gain a broad insight into the business office.

Has an opportunity to decide on his needs for further education as a result of practical experience in one occupation.

Gains much more from his classroom work since it takes on new meaning in view of his laboratory experience.

Has reasonable chance of being hired full-time upon graduation by the business office in which the student has worked as a trainee.

QUALIFICATIONS

Students enrolled in Office Education must be 16 years of age or older. They must be recommended for training by the Office Education Coordinator.

Student-learners are to be punctual, display good work habits, and follow the rules and regulations set up by the training employer.

Students must not attend work on a day that they are sick from school. It is their responsibility to notify their employer if they are ill and will be unable to come to the office.

EMPLOYER ADVANTAGES

Provides a new supply of interested persons who are being trained for careers in business offices.

Reduces the cost of recruiting and training. The cooperation of school authorities and the business community in training and developing the student leads to a better "product" than the school or the business could develop alone.

Provides good part-time employees.

Provides the employer with a more interested and satisfied worker, which will result in less turnover.

Gives the employer access to students of special ability, interest, and aptitude.

EMPLOYER RESPONSIBILITIES

Provide a training station for students enrolled in the program for a minimum of ten hours a week during the entire school year.

Plan with the teacher-coordinator to provide the student with enough variety of experience and training to enable him to perform many office jobs efficiently.

Arrange for the selection of one individual in the business office who will be directly responsible for the student who is training on the job.

Arrange compensation for the student comparable to wages paid beginners in the business; however, the student must then apply for a Student-Learner Certificate which must be signed by the employer before the student starts work. Arrangements for this certificate are made by the coordinator.

STUDENTS:

Who would like to enroll in the Cooperative Office Education program will need to meet the following requirements:

The student must be at least 16 years of age, and a senior at Your High School

The student must be recommended by the Teacher-Coordinator

The student will be responsible for all rules and regulations set up in the Office Education Training plan

EMPLOYERS:

Who participate in the Cooperative Office Education program will need to provide the following:

A suitable training station which will provide the student-learner with a minimum of ten hours per week

A training station that will provide the student-learner with experience in many different aspects of your office

Will need to assign an individual who will assist with the Teacher-Coordinator in training, supervising, and evaluating the progress of the student-learner

Will arrange for compensation to the student-learner at the minimum wage for new employees, or at student-learner rates

For more information concerning Your High School's Cooperative Office Education -

Contact:

Your Name
% Your High School
Your City, State 00000

Phone: 000-0000

Phase VIII - Checklist No. 2 - Form E-2
Form E-2 - ILLUSTRATED BROCHURES
Brochure B

PREPARING FOR A CAREER IN

ACCOUNTING?
CLERICAL?
SECRETARIAL?
DATA PROCESSING?

COOPERATIVE OFFICE EDUCATION

Opportunities for Students

* * *

- An opportunity to acquire and use new skills in a business office

* * *

- An opportunity to decide on your future or a need for further education as a result of practical office experience

* * *

- An opportunity to use knowledge gained from classroom instruction

* * *

- An opportunity that may give you a better chance of being hired in a business office upon graduation

★ ★ ★

WHAT IS COOPERATIVE OFFICE EDUCATION?

Cooperative Office Education is a program of study designed to provide students with the necessary skills and knowledge for a career in office occupations. The skills and knowledge learned in a vocational office education program are of limited value unless a student has had experience in utilizing these skills in an office situation. This experience can be obtained through a model office course, but cooperative work experience is, without doubt, the preferred method of obtaining it.

C.O.E. is a program where students learn business skills and training skills and training in Office Education courses, taking also their regular high school courses. The students are allowed released time from school for an on-the-job learning experience in the business community.

Opportunities for Employers

* * *

- An opportunity to employ students who are being trained for a career in business

* * *

- An opportunity for your business to have an excellent part-time employee

* * *

- An opportunity to save in recruiting and training by having access to student who have special abilities and interests

★ ★ ★

Form F - CERTIFICATE OF PARTICIPATION IN COE PROGRAM

SERVICE EDUCATION PROGRESS

F UTURE
B USINESS
L EADERS
A MERICA

THIS FIRM EMPLOYS A

COOPERATIVE OFFICE EDUCATION

Student Learner

This business is participating in the vocational training of a high school student by providing an on-the-job training station.

DEVELOPING FUTURE BUSINESS LEADERS OF AMERICA

Your encouragement and efforts in this educational program on behalf of the youth of this community is appreciated.

PHASE IX

LAW AND THE COE PROGRAM

PAGE

1. Responsibility of the Teacher Coordinator 90
   - A. Teacher Coordinator's Responsibility in Complying with the Law 91
   - B. Providing Equality 92
   - C. Laws Affecting Employment of Student-Learner (Federal) 94
   - D. Student-Learner's Certificate Application Form 98
   - E. North Dakota Minimum Wage Order No. 7 99
2. Targeted Jobs Tax Credit 105
   - A. Targeted Jobs Tax Credit 106
   - B. Certification of Youth Participating in a Qualified Cooperative Education Program 109
   - C. Sources of Information 111

PHASE IX
Law and the COE Program

PHASE IX - LAW AND THE COE PROGRAM

Checklist No. 1 - Responsibility of the Teacher Coordinator

Objective: To develop an awareness of current state and federal laws pertaining to on-the-job activities.

Suggested Activities:

_____ 1. Refer to Form A which indicates the teacher coordinator's responsibility regarding understanding current laws.

_____ 2. Refer to Form B--Providing Equality.

_____ 3. Refer to Form C which indicates the laws affecting employment of student-learner at the federal level.

_____ 4. See Form D--sample of the student-learners certificate application form.

_____ 5. Refer to Form E which indicates the state laws affecting employment of student-learner.

Forms:

A - Teacher-Coordinator's Responsibility in Complying with the Law

B - Providing Equality

C - Laws Affecting Employment of Student-Learner (Federal)

D - Student-Learner's Certificate Application Form

E - North Dakota Minimum Wage Orders No. 7

F - Invasion of Privacy

Phase IX - Checklist No. 1 - Form A

Form A - Teacher-Coordinator's Responsibility in Complying with the Law

It is expected that the Teacher-Coordinator will be familiar with the laws which influence student learners. The Teacher-Coordinator does not enforce the law, but should inform participating employers and administrators when there is a violation.

Laws which apply to the cooperative program are: Child Labor, Wage and Hour, Social Security, Workman's Compensation, Civil Rights, Labor, and Occupational Safety and Health. There are other federal, state, and local laws which may apply.

When selecting training stations be sure that they are suitable. A written training agreement should be drawn up and signed by all parties. By doing this, problems of violations will be avoided.

A file of all current laws in force should be maintained at all times by the Teacher-Coordinator. A copy of the laws should be given to the training station sponsor. This file must be updated each year as these matters change rapidly.

Phase IX - Checklist No. 1 - Form B

Form B - Providing Equality

Laws prohibiting bias on grounds of race, color, national origin, sex, and handicap are:

1. Title VI of Civil Rights Act of 1964
   The Department of Health, Education, and Welfare issued regulations implementing Title VI of this act in 1965. It prohibits discrimination of the basis of race, color, and national origin in any program or activity receiving federal funds.

2. Title XI of the Education Act of 1972
   This act was implemented by the Department of Health, Education, and Welfare in 1975. It prohibits discrimination on the basis of sex in education programs receiving or benefiting from federal funds.

3. Section 504 of the Rehabilitation Act of 1973
   This was implemented by the Department of Health, Education, and Welfare in 1977. It prohibits discrimination of the basis of handicap in any program or activity receiving federal funds.

4. Section 503 of the Rehabilitation Act of 1973
   This section is concerned with affirmative action guidelines for employers. Basically, any employer doing business with the federal government must take affirmative action to hire qualified handicapped persons if the government contract involves a sum of $2,500. If the contract with the government involves a sum of $50,000 or more, and fifty or more persons are employed, the contractor must develop an affirmative action plan listing the sources from which handicapped persons will be recruited. Cooperative vocational education programs may be listed as one of these sources.

5. Public Law 94-142 Education of All Handicapped Children Act of 1975
This law was implemented in 1978. This law specifically states that school districts must provide handicapped children with programs and services among which vocational education is included.

The law defines handicapped students as those who are:

> . . . mentally retarded, hard of hearing, deaf, speech impaired, visually handicapped, seriously emotionally disturbed, orthopedically impaired, or other health impaired children, or children with specific learning disabilities, who by reason thereof require special education and related services.[1]

The law states that handicapped students should be instructed in the classroom with non-handicapped students "to the maximum extent appropriate."[2] This provision is often referred to as the "least restrictive environment," or "mainstreaming" concept.

6. Federal Register, March 21, 1979 provides final guidelines designed to eliminate bias in Vocational Education programs offered in schools, colleges and universities.

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[1] U.S. Code, 1976 Edition, Title 20, Chapter 33, Sec. 1401-1461, pp. 1091-1092.

[2] Barbara Aiello, "Teachers Ask About Handicapped Children and the New Laws," Education Unlimited, Vol. 1, No. 1, April 1979, p. 33.

Phase IX - Checklist No. 1 - Form C

Form C - Laws Affecting Employment of Student-Learner (Federal)

1. Fair Labor Standards Act
   This act affects most employers. It provides minimum wage and overtime standards (one and one-half times employees regular rate for all hours over 40 hours per week in most cases).

   A. Child Labor Provisions
      At 16 years of age young people may be employed in any occupation other than a nonagriculatural occupation declared hazardous by the Secretary of Labor.[1] This applies to student-learners in office education.

      State child labor laws regulate the employment of all young people not covered by Federal Wage and Hour Law. State law may differ from federal law. In this case, the higher standard prevails.

      (1) Federal and State Labor Offices:

      Wage & Hour Division and Public Contracts
      Third and Rosser
      Bismarck, ND 58501 phone: 255-4011

      (2) State Labor Department

      Commissioner of Labor
      State of North Dakota
      State Capitol Building
      Bismarck, ND 58501

      These offices will be able to provide the following references: Handy Reference Guide to the Fair Labor Standards Act, WH Publication 1282. A Guide to Child Labor Provisions of the Fair Labor Standards Act, Child Labor Bulletin No. 101. Employment of Student-Learners (Regulation Part 520). Developed by the U. S. Department of Labor Employment Standards Administration Wage and Hour Division.

   B. Minimum Wage

      Teacher-coordinators and student-learners must be aware of those occupations and businesses which are covered by the minimum wage laws. The following employees are covered by Federal Minimum Wage Law.[2]

---

[1] A Guide to Child Labor Provisions of the Fair Labor Standards Act, January 1969, WHPC Publication 1258, Bulletin No. 101.

[2] Source: U.S. Department of Labor, Employment Standards Administration, Wage and Hour Division, Handy Reference Guide to the Fair Labor Standards Act, WH Publication 1282, 1978, pages 2-3.

Phase IX - Checklist No. 1 - Form C, Continued

All employees of certain enterprises having workers engaged in interstate commerce, producing goods for interstate commerce, or handling, selling, or otherwise working on goods or materials that have been moved in or produced for such commerce by any person are covered by the Act.

A covered enterprise is the related activities performed through unified operation or common control by any person or persons for a common business purpose and is:

(1) engaged in laundering or cleaning of clothing or fabrics; or

(2) engaged in the business of construction or reconstruction; or

(3) engaged in the operation of a hospital; an institution primarily engaged in the care of the sick, the aged, the mentally ill or defective who reside on the premises; a school for mentally or physically handicapped or gifted children; a preschool, an elementary or secondary school; or an institution of higher education (regardless of whether or not such hospital, institution or school is public or private or operated for profit or not for profit); or

(4) comprised exclusively of one or more retail or service establishments whose gross annual income of sales or business done is not less than--

$250,000

Beginning July 1, 1978--$275,000

Beginning July 1, 1980--$325,000

Beginning July 1, 1982--$362,500

(Any retail or service enterprise which has annual gross volume of not less than $250,000 and which later ceases to be a covered enterprise as a result of increases in this dollar volume test must continue to pay its employees at least the minimum wage in effect at the time of the enterprise's removal from coverage, as well as overtime in accordance with the Act.) or

(5) any other type of enterprise having an annual gross volume of sales or business done of not less than $250,000.

The dollar volume standard mentioned above in (4) and (5) excludes excise taxes at the retail level which are separately stated.

Any establishment which has as its only regular employees the owner thereof or members of the owner's immediate family is not considered part of any enterprise.

Federal employees are subject to the minimum wage, overtime, child labor and equal pay provisions of the Act. Employees of State and local governments are subject to the same provisions, unless they are engaged in traditional government activities, in which case they are subject to the child labor and equal pay provisions only. The Supreme Court has indicated that such equal traditional governmental activities include schools, hospitals, fire prevention, police protection, sanitation, public health, parks, and recreation.

Employees who are not employed in a covered enterprise may still be entitled to the Act's minimum wage, overtime pay, equal pay, and child labor protections if they are individually engaged in interstate commerce. These include:

(a) communication and transportation workers;

(b) employees who handle, ship, or receive goods moving in interstate commerce;

(c) clerical or other workers who regularly use the mail, telephone, or telegraph for interstate communication or who keep records on interstate transactions;

(d) employees who regularly cross state line in the course of their work; and

(e) employees of independent employers who perform clerical, custodial, maintenance, or other work for firms engaged in commerce or in the production of goods for commerce.

Domestic service workers, such as maids, day workers, housekeepers, chauffeurs, cooks, or full-time baby sitters are covered if they (1) receive at least $100 in cash wages in a calendar year from their employer or (2) work a total of more than 8 hours a week for one or more employers.

The North Dakota Legislature has also passed a state minimum wage law that covers all employees not covered under the Federal minimum wage law. Current information regarding North Dakota's minimum wage is available from the North Dakota Department of Labor.

There may be times when student-learners will have to be employed at less than minimum wage in order to prevent a curtailing of employment opportunities. Teacher-coordinators must be familiar with required Subminimum Wage Certificate Requests (permits or certificates which enable an employer to employ a student-learner at subminimum wage), the processes of application, and the conditions governing the issue of the certificate.

The law provides for the employment of certain workers at rates lower than the statutory minimum under the terms of special certificates. Individual certificates are granted for students working part-time in employment related to courses they are studying in school and when such employment has been arranged by the teacher-coordinator of cooperative education in the school the student is attending. The employer must file a subminimum wage certificate request for each student they will employ from a co-op program at less than the minimum wage.

Employment of Student-Learner

Department of Labor, Wage and Hour Publication 1343, Employment of Student-Learners, explains that students employed on a part-time basis pursuant to a bona fide vocational training program may be paid at 75 percent of the current federal minimum wage. The local Wage and Hour Office of the Department of Labor can provide additional information regarding these provisions.

When this certification is used, the equal pay provisions prohibits wage discrimination on the basis of sex within an establishment. That is, when a company is subject to the minimum wage, employees of one sex must not be paid wages at rates lower than those paid employees of the other sex for equal work on jobs requiring equal skill, effort, and responsibility performed under similar working conditions.

2. Social Security

   All student-learners in Cooperative Office Education must secure a social security number. Teacher-Coordinators must be informed about the social security law and its different programs.

   By January 31 of each year and/or when the student-learners terminate their jobs, each employer is required to give them a copy of a W-2 form which includes a statement of social security contributions deducted from their pay, in addition to the amount of wages and other contributions.

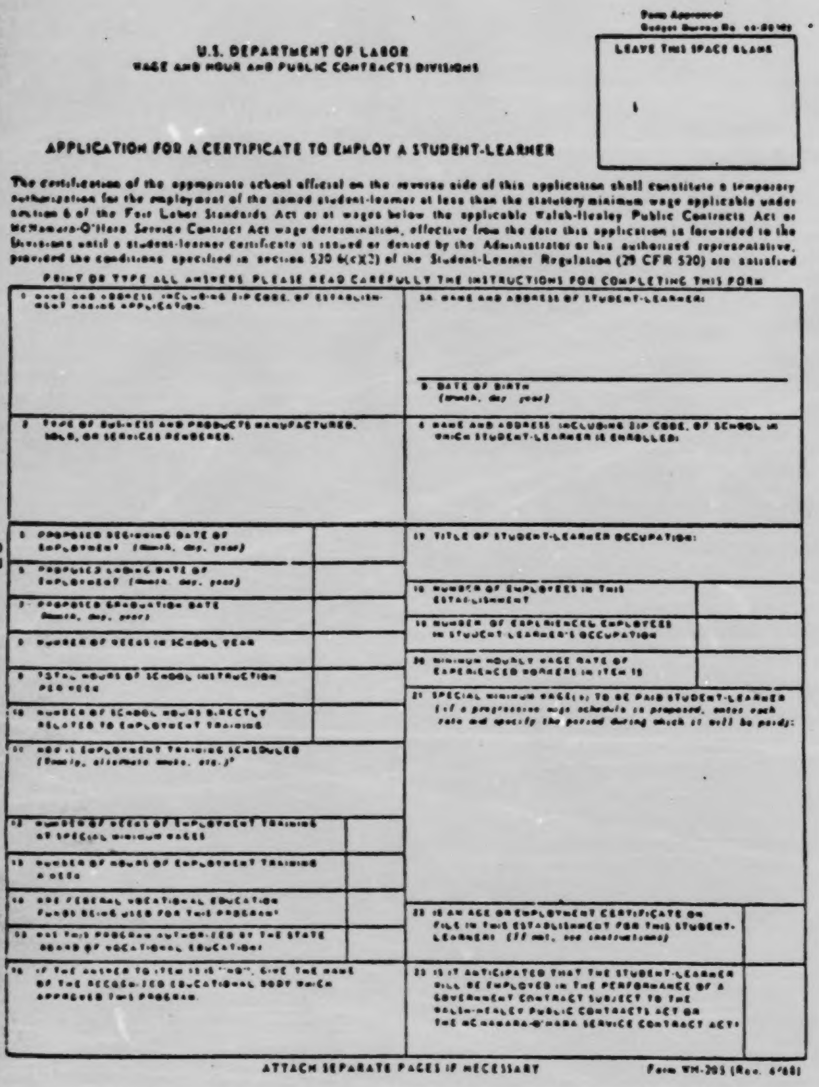
3. Occupational Safety and Health Act of 1970

   This law was created to assure the worker safe and healthful working conditions. The provisions of the law apply to every employer with one or more employees engaged in a business affecting interstate commerce.

   For details of the Act, check in the Code of Federal Regulations (CFR) 1910, Volume 37, Number 202, Part II, Wednesday, October 18, 1972, as amended.

   When this act was passed by Congress, it provided for any state to set up and manage its own safety and health program only if it were "at least as affective as the federal program". If not, the federal government would enforce safety in the state.

Form D - STUDENT-LEARNER'S CERTIFICATE APPLICATION FORM *



Form Approved
Budget Bureau No. 44-R0185

U.S. DEPARTMENT OF LABOR
WAGE AND HOUR AND PUBLIC CONTRACTS DIVISIONS

LEAVE THIS SPACE BLANK

APPLICATION FOR A CERTIFICATE TO EMPLOY A STUDENT-LEARNER

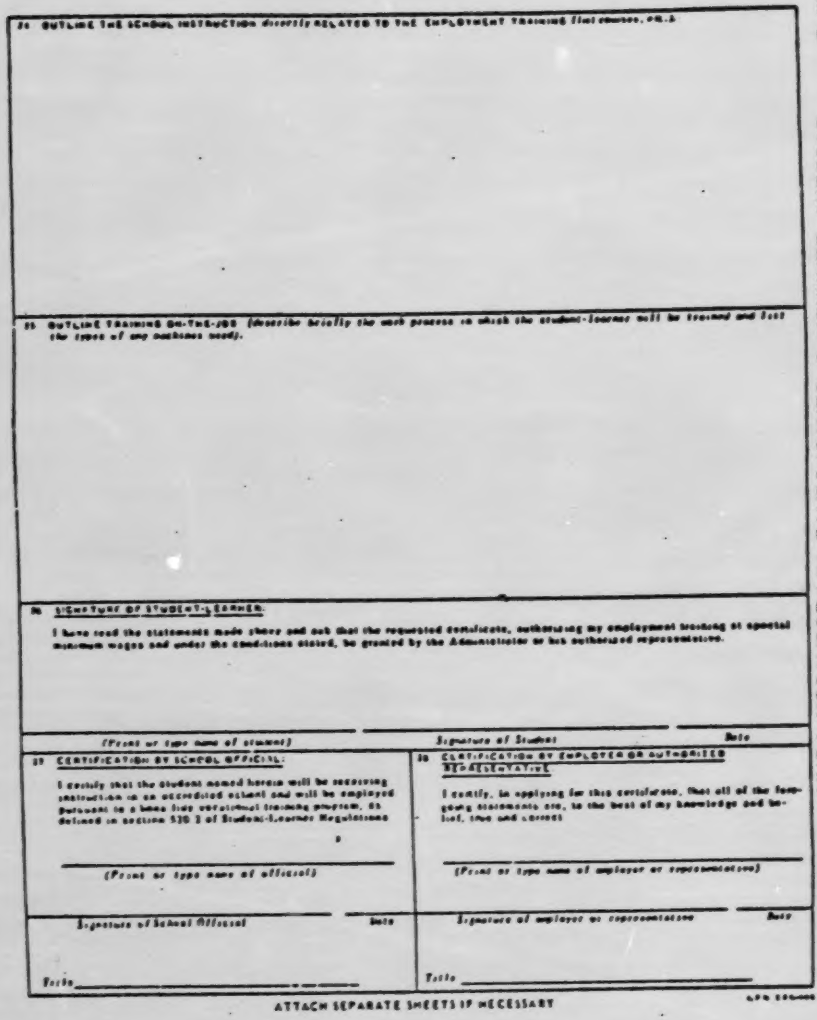
The certification of the appropriate school official on the reverse side of this application shall constitute a temporary authorization for the employment of the named student-learner at less than the statutory minimum wage applicable under section 6 of the Fair Labor Standards Act or at wages below the applicable Walsh-Healey Public Contracts Act or McNamara-O'Hara Service Contract Act wage determination, effective from the date this application is forwarded to the Divisions until a student-learner certificate is issued or denied by the Administrator or his authorized representative, provided the conditions specified in section 520.6(c)(2) of the Student-Learner Regulation (29 CFR 520) are satisfied

PRINT OR TYPE ALL ANSWERS. PLEASE READ CAREFULLY THE INSTRUCTIONS FOR COMPLETING THIS FORM

1. NAME AND ADDRESS, INCLUDING ZIP CODE, OF ESTABLISHMENT MAKING APPLICATION:
2a. NAME AND ADDRESS OF STUDENT-LEARNER:
2b. DATE OF BIRTH (month, day, year)
3. TYPE OF BUSINESS AND PRODUCTS MANUFACTURED, SOLD, OR SERVICES RENDERED.
4. NAME AND ADDRESS, INCLUDING ZIP CODE, OF SCHOOL IN WHICH STUDENT-LEARNER IS ENROLLED:
5. PROPOSED BEGINNING DATE OF EMPLOYMENT (month, day, year)
6. PROPOSED ENDING DATE OF EMPLOYMENT (month, day, year)
7. PROPOSED GRADUATION DATE (month, day, year)
8. NUMBER OF WEEKS IN SCHOOL YEAR
9. TOTAL HOURS OF SCHOOL INSTRUCTION PER WEEK
10. NUMBER OF SCHOOL HOURS DIRECTLY RELATED TO EMPLOYMENT TRAINING
11. HOW IS EMPLOYMENT TRAINING SCHEDULED (Daily, alternate weeks, etc.)?
12. NUMBER OF WEEKS OF EMPLOYMENT TRAINING AT SPECIAL MINIMUM WAGES
13. NUMBER OF HOURS OF EMPLOYMENT TRAINING A WEEK
14. ARE FEDERAL VOCATIONAL EDUCATION FUNDS BEING USED FOR THIS PROGRAM?
15. WAS THIS PROGRAM AUTHORIZED BY THE STATE BOARD OF VOCATIONAL EDUCATION?
16. IF THE ANSWER TO ITEM 15 IS "NO", GIVE THE NAME OF THE RECOGNIZED EDUCATIONAL BODY WHICH APPROVED THIS PROGRAM.
17. TITLE OF STUDENT-LEARNER OCCUPATION:
18. NUMBER OF EMPLOYEES IN THIS ESTABLISHMENT
19. NUMBER OF EXPERIENCED EMPLOYEES IN STUDENT-LEARNER'S OCCUPATION
20. MINIMUM HOURLY WAGE RATE OF EXPERIENCED WORKERS IN ITEM 19
21. SPECIAL MINIMUM WAGE(S) TO BE PAID STUDENT-LEARNER (If a progressive wage schedule is proposed, enter each rate and specify the period during which it will be paid):
22. IS AN AGE OR EMPLOYMENT CERTIFICATE ON FILE IN THIS ESTABLISHMENT FOR THIS STUDENT-LEARNER? (If not, see instructions)
23. IS IT ANTICIPATED THAT THE STUDENT-LEARNER WILL BE EMPLOYED IN THE PERFORMANCE OF A GOVERNMENT CONTRACT SUBJECT TO THE WALSH-HEALEY PUBLIC CONTRACTS ACT OR THE McNAMARA-O'HARA SERVICE CONTRACT ACT?

ATTACH SEPARATE PAGES IF NECESSARY

Form WH-205 (Rev. 6/68)



24. OUTLINE THE SCHOOL INSTRUCTION directly RELATED TO THE EMPLOYMENT TRAINING (list courses, etc.)
25. OUTLINE TRAINING ON-THE-JOB (describe briefly the work process in which the student-learner will be trained and list the types of any machines used).
26. SIGNATURE OF STUDENT-LEARNER:

I have read the statements made above and ask that the requested certificate, authorizing my employment training at special minimum wages and under the conditions stated, be granted by the Administrator or his authorized representative.

(Print or type name of student) ____ Signature of Student ____ Date ____

27. CERTIFICATION BY SCHOOL OFFICIAL:

I certify that the student named herein will be receiving instruction in an accredited school and will be employed pursuant to a bona fide vocational training program, as defined in section 520.2 of Student-Learner Regulations

(Print or type name of official) ____

Signature of School Official ____ Date ____

Title ____

28. CERTIFICATION BY EMPLOYER OR AUTHORIZED REPRESENTATIVE:

I certify, in applying for this certificate, that all of the foregoing statements are, to the best of my knowledge and belief, true and correct

(Print or type name of employer or representative) ____

Signature of employer or representative ____ Date ____

Title ____

ATTACH SEPARATE SHEETS IF NECESSARY

---

*Warren G. Meyer, Lucy Crawford, Mary K. Klaurens, Coordination in Cooperative Vocational Education, University of North Dakota, Grand Forks, (1975) p. 310,311.

North Dakota Department of Labor

MINIMUM WAGE ORDERS

TAKE NOTICE: That pursuant to the authority in him vested by the laws of the State of North Dakota, and in accordance with the determination by him today duly made and rendered, THE COMMISSIONER OF LABOR of the State of North Dakota pursuant to the provisions of Chapter 34-06 N.D. Century Code, hereby ORDERS that:

PROFESSIONAL, TECHNICAL, CLERICAL AND SIMILAR OCCUPATIONS MINIMUM WAGE ORDER No. 7

1. Experienced workers: No employer shall employ any experienced person in the Professional, Technical, Clerical and Similar Occupations, throughout all areas of this state for less than $2.80 per hour.

2. Learners: No employer shall employ any learner, (less than 90 days) in the Professional, Technical, Clerical and Similar Occupations, throughout all areas of this state for less than $2.40 per hour.

3. Student-Learners: A student-learner is a boy or girl 16 years of age or older, who is receiving instruction in a high school, college or university, and is employed on a part-time basis, pursuant to a bona fide vocational training program including a training agreement authorized and approved by the State Board for Vocational Education or other recognized educational body. Student-learner shall be employed at no less than $1.70 per hour.

4. Effective January 1, 1980 experienced workers shall be paid no less than $3.10 per hour, learners $2.70 per hour and student-learners $1.70 per hour.

5. Every employee employed in this occupation whether regularly or on part-time basis shall be paid the same hourly wage provided, however, that if such employee is a part-time worker, the employer shall so arrange consecutive hours of continuous employment so that such employee may have a fair opportunity for securing such other wages. Stand by time (on the premises) will be considered as hours worked.

6. Hours: Any time worked in excess of 40 hours in any one week must be paid at no less than 1½ times their regular rate of pay. Management and management trainees shall be exempted from overtime provisions, provided that they don't spend more than fifty percent of their time outside of management duties. This applies to all employees covered by this wage order. A thirty minute uninterrupted time between the 3rd and 5th hours of work shall be allowed for meals on each shift of work.

7. Every employer shall keep payroll records of the hours worked and rate or pay his employees received in each pay period. This information shall be shown on check stubs or pay vouchers issued to employees along with the required state and federal tax deductions.

8. Minors: A minor, for purposes of this order, is a person of either sex between the ages of 14 and 16 years. This order shall apply to all minors. Minors under 16 years of age may not be employed for more than six days in any one week, nor for more than 8 hours in any one day and not more than 48 hours in any one week.

"Professional, Technical, Clerical and Similar Occupations" means professional semi-professional, laboratory, research, clerical, technical, and office occupations. Such occupations shall include: accountants, accounting clerks, appraisers, board markers, bookkeepers, checkers, checkroom attendants, canvassers, circulation clerks, claim adjuster, classified advertising sales people, compilers, collectors, computers, elevator operators, instructors, interviewers, librarians, and their assistants, physicians and dentists' assistants and attendants, secretaries, social workers, statisticians, stenographers, teachers, telephone, teletype, and telegraph operators, tellers, typists, nurses aides, life guards, dispatchers, health spa's, hair dressers, nurses, pet groomers and other related occupations. Providing, further, any employee earning $250.00 or more a week shall be exempt from the provisions of this order. Nurses, licensed practical nurses, nurses aides, pharmacists, laboratory technicians and respiratory therapists shall have the option of working not more than 8 hours in any one day and 80 hours in any 14 day period, or, the 40 hour overtime provision, all as provided in the Fair Labor Standards Act, as amended. However, occupations performed in an industry covered by another North Dakota industry minimum wage order would not be subject to this order.

SAID ORDER SHALL BECOME EFFECTIVE ON AND AFTER JULY 1, 1979

Orville W. Hagen, Commissioner
DEPARTMENT OF LABOR

CHILD LABOR LAWS provide for boys and girls sufficient time for schooling and recreation. CHILD LABOR LAWS are necessary to prevent the employment of children at unsuitable ages of undesirable working conditions, for too long hours or at night, at tasks too hazardous for youthful judgment and strength or at jobs that may retard their physical development or be injurious to their health.

WHAT ARE MINIMUM AGES FOR EMPLOYMENT OF CHILDREN

1. According to Chapter 34-07, N.D. Century Code, employment of minors under fourteen years of age prohibited. No minor under fourteen years of age shall be employed or permitted to work in, or in connection with, any factory, workshop, mercantile establishment, store, business office, telegraph office, restaurant, hotel, apartment house, or in the distribution or transmission of merchandise or messages. No person, firm, or corporation shall employ any minor under fourteen years of age in any business or service whatever during any part of the hours when the public schools of the district in which the minor resides are in session.

2. No minor under the age of sixteen years shall be employed or permitted to work in:

    1. Any employment involving the use of any power driven machinery; but this prohibition shall not apply to the use of (a) office machines, such as adding machines or typewriters; (b) tagging, pricing or similar machines used in retail stores; (c) domestic-type machines used in food service operations, such as toasters, coffee grinders, milk shake blenders; or (d) machines used in service stations, such as those in connection with car cleaning, washing or polishing, or in the dispensing of gasoline or oil, provided however, that no work may be done in connection with cars and trucks if such work involves the use of pits, racks, or lifting apparatus, or involving the inflation of any tire mounted on a rim equipped with removable retaining ring.
    2. Construction work of any kind;
    3. Lumbering or logging operations;
    4. Sawmills or planing mills;
    5. The manufacture, disposition, or use of explosives;
    6. Any capacity which requires the adjusting of any belt to any machinery or the oiling, wiping, or cleaning of any machinery;
    7. Any employment which requires the operation, or the assisting in the operation, of any power driven woodworking machinery or emery or polishing wheels used for polishing metal;
    8. The operation of stamping machines in sheet metal and tinware manufacturing;
    9. The operation of stamping machines in washer and nut factories operating corrugating rolls such as are used in roofing factories;
    10. The operation of any steam boiler, steam machinery, or other steam generating apparatus;
    11. The operation or assisting in the operation of dough brakes or cracker machinery of any description;
    12. The operation of wire or iron straightening machinery;
    13. The operation or assisting in the operation of rolling mill machinery punches, or shears, or washing, grinding, or mixing mills, or calendar rolls in rubber manufacture;
    14. The operation or assisting in the operation of laundry machinery;
    15. Preparing any composition in which dangerous or poisonous acids are used;

16. The manuafacture of paints, colors, or white lead;

17. Operating or assisting in the operation of passenger or freight elevators;

18. Any mine or quarry;

19. The manufacture of goods for immoral purposes; and

20. Any other employment not herein specifically enumerated that may be considered dangerous to his life or limb or in which his health may be injured or his morals depraved.

Nothing contained in this section shall prohibit a minor from doing ordinary farm labor or from operating farm machinery. No female under sixteen years of age shall be employed in any capacity if such employment compels her to remain standing constantly. This section shall not prevent the education of a minor in music nor the employment of a minor as a singer or musician in a church, school, or academy, or in any school or home talent exhibition given by the people of a local community.

3. Under Section 38-01-05, prohibiting the employment of anyone under the age of 18 years in any underground workings or mine.

MAXIMUM HOURS OF LABOR OF MINORS UNDER SIXTEEN YEARS OF AGE

No minor under the age of sixteen years shall be employed or permitted to work at any occupation, except in domestic services and at farm labor, before the hour of seven o'clock a.m., nor after the hour of seven o'clock p.m., except that such hours shall be seven o'clock a.m. to nine o'clock p.m. from June first through Labor Day, nor more than twenty-four hours during school weeks, nor more than three hours on school days, nor more than forty-eight hours during nonschool weeks, nor more than eight hours on nonschool days.

Certificates of Employment are required for any minors between the ages of 14 and 16. These certificates can be obtained from the County Superintendent of schools or the City Superintendent of school in cities of over 5,000 population.

A VIOLATION OF THE CHILD LABOR LAWS IS AN INFRACTION.

WAGE PAYMENT AND WAGE COLLECTION LAW

Wages shall include all payments made to or on behalf of an employee as renumerated for employment, whether calculated on a time, piece, job or incentive basis.

Every employer shall pay all wages due to his employees at least twice each calendar month, or on regular agreed paydays designated in advance by the employer in lawful money of the United States or with checks on banks convenient to the place of employment.

When an employer discharges or terminates an employee, the unpaid wages or compensation of that employee shall become due immediately and the employer shall pay those wages to the employee within 24 hours of the time of separation at the employer's place of business, or shall pay those wages within 15 days or at the next regular pay period, whichever occurs first.

When an employee, not having a written employment contract for a definite period, quits or resigns his employment, the wages or compensation earned shall become due and payable not later than the next regular stated payday.

Every employer shall withhold from the compensation due his employees those amounts which are required by state or federal law to be withheld and may deduct other items authorized in writing by the employees.

When an employee is not paid wages due, the Commissioner of Labor or his deputy shall have power and authority to take assignments of wage claims without being bound by any of the technical rules with reference to the validity of such assignments and shall have power and authority to prosecute actions for the collection of such claims which are valid and enforceable in the courts.

EMPLOYMENT DISCRIMINATION

It is the policy of North Dakota to prohibit discrimination because of race, color, religion, sex, or national origin in all employment practices, including hiring, firing, promotion, compensation and other terms, privileges, and conditions of employment. This Act shall not apply to employers with fifteen or fewer employees.

EQUAL PAY

No employer shall discriminate between employees on the basis of sex by paying higher wages to employees of the opposite sex for the same or substantially similar work on jobs which are performed under similar working condition; unless such payment is due to a seniority system, a merit system, job descriptive system, or executive training program.

34-06-17. INVESTIGATION OF COMPLIANCE WITH ORDERS; FAILURE TO OBSERVE OR COMPLY. The commissioner, from time to time shall investigate and ascertain whether or not employers in this state are observing and complying with his orders issued pursuant to the provisions of this chapter, and shall take such steps as may be necessary to cause the prosecution of employers failing to observe or comply therewith.

34-06-18. EMPLOYER DISCRIMINATING AGAINST EMPLOYEES. No employer shall discharge or in any other manner discriminate against any employee because such employee has testified or is about to testify, or because such employer believes that the employee may testify, in any investigation or proceeding under or relative to this chapter.

PRIVATE EMPLOYMENT AGENCIES LAW

This protects the job seeker and employer who utilize the services of private employment agencies by the licensing and regulation of private employment agencies.

The agency's license, schedule of fees and rules and regulations must be posted in each agency so that they are visible to any person using the service.

Phase IX - Checklist No. 1 - Form F

Form F - INVASION OF PRIVACY

The unconsented, unprivileged, and unreasonable intrusion into the private life of an individual is invasion of privacy. Unlike defamation, privacy can be violated although no publication to third persons takes place and even though the matters delved into are true or not particularly harmful to reputation. The concept of right of privacy is analogous to that of trespass, which gives one the right to keep unwarranted intruders off one's land not because of any resulting emotional distress or loss of rents, but merely to ensure the solitude of landowners. Though the boundaries in this concept have not been definitely determined, its primary concern is the protection of a mental interest--such as freedom from mental anguish resulting from invasion of one's privacy.[1]

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[1] Hanson, Libel and Related Torts, pp. 197-206.

PHASE IX - LAW AND THE COE PROGRAM

Checklist No. 2 - Targeted Jobs Tax Credit (TJTC)

Objective: To inform employers of eligibility for tax credit through the Targeted Jobs Tax Credits established by the Revenue Act of 1978 (P. O. 95-600)

Suggested Activities:

_____ 1. Review provisions of P.L. 95-600 (TJTC) - Form A.

_____ 2. Inform employers of their eligibility for Targeted Jobs Tax Credit.

_____ 3. Provide sample IRS form 6199 - Form B.

_____ 4. Refer to sources of information - Form C.

FORMS:

A - Targeted Jobs Tax Credit

B - Certification of Youth Participating in a Qualified Cooperative Education Program

C - Sources of Information

Phase IX - Checklist No. 2 - Form A

Form A - TARGETED JOBS TAX CREDIT

Employers of students participating in cooperative education programs qualify for a tax credit under the Revenue Act of 1978.

The new law allows credit for the employment of seven categories of persons who ordinarily have difficulty obtaining work. Included are youths, 16 but not yet 19, who have not graduated from vocational or high school but are participating in a qualified cooperative education program.

Others are:

- Handicapped persons undergoing vocational rehabilitation.
- Eighteen to 24-year-olds from economically disadvantaged families.
- Recipients of Supplementary Security Income payments.
- Vietnam veterans under 35 who are economically disadvantaged.
- Persons who have received cash payments from state or local general assistance programs for 30 days or more.
- Economically disadvantaged ex-convicts who are hired within five years of the date of their conviction or release from prison, whichever is later.

Employees must have been hired after September 26, 1978. The tax credit is based on wages earned between January 1, 1979, and December 31, 1980. It is equal to 50 percent of the first-year wages and 25 percent of second-year wages up to $6,000.

To obtain the tax credit, employers participating in cooperative education programs should file Internal Revenue Service (IRS) Form 6199 which will be available in mid-April from the IRS and State Boards of Vocational Education.

FEDERAL REGISTER

Monday
April 2, 1979

Vol. 44, No. 64
Pages 19181-19366

DEPARTMENT OF THE TREASURY

Internal Revenue Service

26 CFR Part 5

Temporary Income Tax Regulations Under the Revenue Act of 1978; Credit for Employment of Certain New Employees

AGENCY: Internal Revenue Service, Treasury.

ACTION: Temporary regulations.

SUMMARY: This document provides temporary regulations relating to the credit for employment of individuals qualifying as members of a targeted group. These temporary regulations provide rules regarding the making of an election to claim the targeted jobs credit. In addition, a definition of "program of vocational education" relating to youths participating in a qualified cooperative education program is provided, as well as the requirements for certifying members of this group. Changes to the applicable tax law were made by the Revenue Act of 1978.

DATE: The temporary regulations apply generally to amounts paid or incurred after December 31, 1978, for taxable years ending after that date, to members of a targeted group first hired after September 26, 1978, and to certain vocational rehabilitation referrals hired before September 27, 1978.

FOR FURTHER INFORMATION CONTACT:
Douglas W. Charnas, of the Legislation and Regulations Division, Office of Chief Counsel, Internal Revenue Service, 1111 Constitution Avenue, N.W., Washington, D.C. 20224
(202) 566-3346
(Attention: CC:LR:T, 202-566-3346).

SUPPLEMENTARY INFORMATION:

Background

This document contains temporary regulations relating to the credit for employment of individuals qualifying as members of a targeted group. The temporary regulations are necessary because of the amendments made to sections 44B and 51 by section 321 of the Revenue Act of 1978 (Pub. Law 95-600, 92 Stat. 2830). The temporary regulations provided by this document will remain in effect until superseded by final regulations on this subject. Additional rules will be adopted, but they will appear first as proposed regulations in a notice of proposed rulemaking to be issued at a later time.

Effective Date

In general, a taxpayer may elect to claim a credit under section 44B (as amended by the Revenue Act of 1978) for amounts paid or incurred after December 31, 1978, for taxable years ending after that date, to members of a targeted group. Generally, to qualify for the credit, the amounts must be paid or incurred to members of a targeted group first hired after September 26, 1978. However, amounts paid or incurred after December 31, 1978, to a vocational rehabilitation referral hired before September 27, 1978, may qualify for the credit if a credit under section 44B (as in effect prior to enactment of the Revenue Act of 1978) was claimed for the individual by the taxpayer for a taxable year beginning before January 1, 1979.

Election to Claim Targeted Jobs Credit

Paragraph (b) of § 5.44b-1 provides that the taxpayer may make the election by merely claiming the credit on an original or amended tax return. The election may be made (or revoked) at any time before the expiration of the 3-year period beginning on the last date prescribed by law for filing the return for such taxable year (determined without regard to extensions).

Youths Participating in a Qualified Cooperative Education Program

Section 51 (d) (1) lists seven targeted groups. One of the targeted groups consists of youths participating in a qualified cooperative education program. To qualify as a youth participating in a qualified cooperative education program, the school offering the program must certify that the individual meets certain requirements. Section 5.51-1 provides that a school may satisfy the certification requirement by completing Form 6199. The term "program of vocational education", which is an integral part of the definition of a "qualified cooperative education program", is defined in the regulations.

Waiver of Certain Procedural Requirements

There is need for expeditious adoption of the provisions contained in this document because fiscal year taxpayers with taxable years ending in 1979 will need immediate guidance on the procedures for electing the credit provided by section 321 of the Revenue Act of 1978 and schools offering qualified cooperative education programs will need immediate guidance on the requirements for certifying students participating in these programs. For this reason, Jerome Kurtz, Commissioner of Internal Revenue, has determined that the provisions of paragraphs 8 through 14 of the Treasury Department directive implementing Executive Order 12044 must be waived.

Drafting Information

The principal author of this regulation is Douglas W. Charnas of the Legislation and Regulations Division of the Office of Chief Counsel, Internal Revenue Service. However, personnel from other offices of the Internal Revenue Service and Treasury Department participated in developing the regulation, both on matters of substance and style.

Adoption of Amendments to the Regulations

Accordingly, the following new sections are adopted and inserted in part 5, Temporary Income Tax Regulations under the Revenue Act of 1978 (26 CFR Part 5):

§ 5.44B-1 Credit for employment of certain new employees.

(a) *In general.* Under section 44B (as amended by the Revenue Act of 1978) a taxpayer may elect to claim a credit for wages (as defined in section 51(c)) paid or incurred after December 31, 1978, for taxable years ending after that date to members of a targeted group (as defined in section 51(d)). Generally, to qualify for the credit, the wages must be paid or incurred to members of a targeted group first hired after September 26, 1978. However, wages paid or incurred after December 31, 1978, to a vocational rehabilitation referral (as defined in section 51(d)(2)) hired before September 27, 1978, may qualify for the credit if a credit under section 44B (as in effect prior to enactment of the Revenue Act of 1978) was claimed for the individual by the taxpayer for a taxable year beginning before January 1, 1979. The amount of the credit shall be determined under section 51. Section 280C(b) (relating to the requirement that the deduction for wages be reduced by the amount of the credit) will not apply to taxpayers who do not elect to claim the credit.

(b) *Time and manner of making election.* The election provided for in section 44B (as amended by the Revenue Act of 1978) may be made by claiming the credit on an original return, or on an amended return at any time before the expiration of the 3-year period beginning on the last date prescribed by law for filing the return for the taxable year (determined without regard to extensions). The election may be revoked within the above-described 3-year period by filing an amended return on which the credit is not claimed.

§ 5.51-1 Youth participating in a qualified cooperative education program.

For an individual to qualify as a "youth participating in a qualified cooperative education program" under section 51(d)(8), the individual must be certified in writing by the qualified school (as defined in section 51(d)(8)(C)) participating in the program as meeting the conditions specified in section 51(d)(8)(A). The school may satisfy the certification requirement by completing Form 6199. For purposes of section 51(d)(8)(B) relating to the definition of a "qualified cooperative education program", the term "program of vocational education" means an organized educational program which is directly related to the preparation of individuals for employment, or for additional preparation for a career requiring other than a baccalaureate or advanced degree. An "organized education program" means only instruction related to the occupation or occupations for which the students are in training.

There is need for the immediate guidance provided by the provisions contained in this Treasury decision. For this reason, it is found impracticable to issue this Treasury decision with notice and public procedure under subsection (b) of section 553 of title 5 of the United States Code or subject to the effective date limitation of subsection (d) of that section.

This Treasury decision is issued under the authority contained in sections 44B and 7805 of the Internal Revenue Code of 1954 (92 Stat. 2834, 26 U.S.C. 44B; 68A Stat. 917, 26 U.S.C. 7805).

Jerome Kurtz,
Commissioner of Internal Revenue.

Approved: March 21, 1979.

Donald C. Lubick,
Assistant Secretary of the Treasury.

[T.D. [illegible]]

[FR Doc. 79-[illegible] Filed 3-30-79; 8:45 am]

BILLING CODE 4830-01-M

PHASE IX - Checklist No. 2 - Form B

Form 6199
(March 1979)
Department of the Treasury
Internal Revenue Service

Certification of Youth Participating in a Qualified Cooperative Education Program

For Purposes of the Targeted Jobs Credit Under Section 44B of the Internal Revenue Code

Certification initiated by (check one)
☐ Employer ☐ Student ☐ School

Part I Qualified School Offering Cooperative Education Program

Name of school	Telephone number

Address (Number and street)

City, State, and ZIP code

School system

Part II Employer

Name of business	Employer identification number

Address (Number and street)

City, State, and ZIP code

Employer representative	Title	Telephone number

Part III Student *(Targeted Group E—See Instruction C)*

Name	Date of birth (month, day, year)	Social security number

Address (Number and street)

City, State, and ZIP code

Date employed or will be employed	Starting wage per hour
Duration of cooperative program of the student From (date) to	Number of hours per week

Part IV Certification by School *(See Instruction B for Definitions)*

I hereby certify that the student named in Part III is a "youth participating in a qualified cooperative education program;" the school named in Part I is a "qualified school;" and the cooperative education program of the school in which the named student is enrolled is a "qualified cooperative education program."

Name of certifying officer (type or print)	Title
Signature ▶	Date

Part V Signature of Employer *(See Instruction A)*

I hereby certify that the above information is correct and true to the best of my knowledge. This form is for the purpose of obtaining the benefits of the Targeted Jobs Tax Credit under section 44B of the Internal Revenue Code. I understand that my credit for employing the student named in Part III will cease upon notification of any subsequent invalidation of this certification.

Signature ▶	Date

283-463-2

Form 6199 (3-79)

138

Instructions

A. Purpose of Form 6199

For an individual to qualify as a youth participating in a qualified cooperative education program (as defined in B below), the individual must be certified in writing by a qualified school as meeting the conditions specified in B(1) below. The school may satisfy the certification requirement by completing Form 6199. The certification allows the employer named in Part II of Form 6199 to claim the targeted jobs credit for qualified wages paid or incurred after December 31, 1978, to the student named in Part III of the form.

Parts I through IV of Form 6199 are prepared in triplicate by the school. The original of the form is given to the employer. The school also gives one copy of the form to the Central State Employment Security Agency for the state in which the school is located and the remaining copy is retained by the school for its records.

When the employer receives the form from the school, the employer must sign Part V certifying that the information on the form is correct before the targeted jobs credit can be claimed for wages paid to the student named on the form. Form 6199 must be kept by the employer for tax purposes.

B. Definitions

(1) Youth Participating in a Qualified Cooperative Education Program.—In general, the term "youth participating in a qualified cooperative education program" means any individual who is certified in writing by the school participating in the program as meeting the following conditions:

(i) having attained age 16 and not having attained age 19,

(ii) not having graduated from a high school or vocational school, and

(iii) being enrolled in and actively pursuing a qualified cooperative education program.

(2) Qualified School.—The term "qualified school" means:

(i) a specialized high school used exclusively or principally for the provision of vocational education to individuals who are available for study in preparation for entering the labor market,

(ii) the department of a high school used exclusively or principally for providing vocational education to persons who are available for study in preparation for entering the labor market, or

(iii) a technical or vocational school used exclusively or principally for the provision of vocational education to persons who have completed or left high school and who are available for study in preparation for entering the labor market.

A school which is not a public school shall be treated as a qualified school only if it is exempt from tax under section 501(a) of the Internal Revenue Code.

(3) Qualified Cooperative Education Program.—For purposes of section 51(d)(8)(B) of the Internal Revenue Code relating to the definition of a "qualified cooperative education program," the term "program of vocational education" means an organized educational program which is directly related to the preparation of individuals for employment, or for additional preparation for a career requiring other than a baccalaureate or advanced degree. An "organized education program" means only instruction related to the occupation or occupations for which the students are in training.

C. Instructions for Employer

For tax years ending after December 31, 1978, the qualified first year wages or qualified second year wages paid to the employee(s) certified as a youth(s) participating in a qualified cooperative education program are to be entered on the "Targeted Group E" line(s) of the appropriate Form 5884–FY, Jobs Credit, or Form 5884, Jobs Credit.

U.S. GOVERNMENT PRINTING OFFICE [illegible]

Phase IX - Checklist No. 2 - Form C

Form C - SOURCES OF INFORMATION

For additional information regarding the Targeted Jobs Tax Credit, contact both of the following:

a. Local Internal Revenue Service and request Publication 906 entitled Targeted Jobs Tax Credit and WIN Credit Forms 6177 and 6199.

b. State Supervisor of Office Education
900 East Boulevard
Bismarck, ND 58505

PHASE X

COORDINATION TECHNIQUES

PAGE

1. Establishment of a Supervisor Development Program 112
   - A. What is a Supervisor Development Program 113
   - B. Why Have a Supervisor Development Program 113
   - C. Procedure for Organization of Orientation Meeting for Supervisor Development Program 114
   - D. Responsibilities of Coordinator and Supervisor in a Cooperative On-The-Job Training Program......... 115
   - E. Tentative Supervisor Training Calendar................ 117

2. Orientation of Student-Learner to Cooperative Training Firm 119
   - A. Adjustment of Student-Learner to a Job Environment .. 120
   - B. Development of Orientation Procedures 121

3. Coordination Through Visitations to Training Firm 122
   - A. Purpose and Frequency of On-Site Visitations 123
   - B. Techniques in Observation............................ 126
   - C. Summary Form — On-Site Visitation 127

4. Conference With Job Supervisor 128
   - A. Job Supervisor Interviews............................ 129
   - B. Suggested Guidelines for Supervision Interviews 130

5. Conference With Student-Learner 131
   - A. Counseling With Students and Parents................ 132
   - B. Adjusting to Problem Situations 133

6. Utilization of Three-Way Conferences: Coordinator, Supervisor, and Student-Learner............. 134
   - A. The Purpose and Frequency of the Three-Way Conference.................................. 135
   - B. Conducting the Three-Way Conference 137
   - C. Evaluation of the Three-Way Conference 138

PHASE X - COORDINATION TECHNIQUES

Checklist No. 1 - Establishment of a Supervisor Development Program

Objective: To develop a plan for organizing a supervisor development program to orient management to the details of a cooperative office education program.

Suggested Activities:

_____ 1. Read Form A which defines a sponsor development program.

_____ 2. Review Form B which lists several reasons for establishing such a program.

_____ 3. Refer to Form C which suggests a plan for organizing a breakfast or luncheon orientation meeting for all job sponsors in your program.

_____ 4. Review the duties of the coordinator and supervisor as stated in Form D.

_____ 5. Refer to Tentative Supervisor Training Calendar - Form E.

Forms:

A - What is a Supervisor Development Program?

B - Why Have a Supervisor Development Program?

C - Procedure for Organization of Orientation Meeting for Supervisor Development Program

D - Responsibilities of Coordinator and Supervisor in A Cooperative On-The-Job Training Program

E - Tentative Supervisor Training Calendar

Phase X - Checklist No. 1 - Form A

Form A - WHAT IS A SUPERVISOR DEVELOPMENT PROGRAM?

General Information:

The job of the coordinator is to help management develop a full understanding of their responsibility in the education of the cooperative office education student-learner. With this in mind, a special training program can be organized to relate the workings of the cooperative program which is being carried out in your school. It will be the responsibility of the coordinator to contact management explaining the benefits of setting up a supervisor development seminar. Inform management that a luncheon or breakfast meeting will be held to initially orient all supervisors.

The supervisor will be the liaison for management regarding relations with the cooperative program in the shcool. Through a Supervisor Development Program the coordinator will inform the supervisor about the program and suggest supervision and training techniques.

Phase X - Checklist No. 1 - Form B

Form B - WHY HAVE A SUPERVISOR DEVELOPMENT PROGRAM?

General Information:

Purposes of a Supervisor Development Program applicable to all areas of vocational education would include the following:

To improve the lines of supervision surrounding your students and your coordination with them.

To secure a better opportunity for related classroom experiences for students.

To secure correlation with classroom instruction.

To achieve better production from the students.

To relieve management of the constant details of a Co-op Program.

To develop supervisory ability of personnel responsible for training of student-learners.

To establish a system to discover "hidden talents" that exist in students.

To save time through group orientation.

To up-grade the total cooperative program.

Phase X - Checklist No. 1 - Form C

Form C - PROCEDURE FOR ORGANIZATION OF ORIENTATION MEETING FOR SUPERVISOR DEVELOPMENT PROGRAM

I. Contact Management in Person

- A. Explain plan for supervisor appointment
    - 1. List benefits to management
    - 2. Request appointment of individual to serve as supervisor of student-learner
    - 3. Set luncheon or breakfast meeting: date, time, and place

- B. Gain support of management on over-all plan

II. Designation of Supervisor

- A. Management appoints and refers person to coordinator
- B. Coordinator briefly explains program
- C. Coordinator extends luncheon invitation

III. Plan for First Orientation Meeting of Supervisors

- A. Greetings: coordinator
- B. Introductions: names, organizations, student-learners
- C. Meal
- D. Over-all plan for supervisor program
    - 1. Purposes of supervisor system (See Form B)
    - 2. Benefits of program to students and supervisors
    - 3. Responsibilities of supervisors (See Form D)
    - 4. How coordinator works with supervisors: reports, progress reports, etc.

- E. Open discussion
    - 1. Reaction of proposed working relationship
    - 2. Recommendations for improvement of relationship and over-all program
    - 3. Suggestions for planning future meetings
        - a. How often (coordinator ready to suggest once every month, six weeks, or nine weeks)
        - b. Time, place, length, etc.
        - c. Topics and problems

- F. Closing: state that each supervisor will be contacted before next meeting

IV. Topics for Future Meetings (Refer to Form E)

- A. Using the progress reports (Example of topic)
    - 1. Procedure and factual information
    - 2. Standards for rating

- B. Open discussion of problems at end of each meeting
- C. Presentation of unit content and suggestions for application at training station (See Form D)

Phase X - Checklist No. 1 - Form D

Form D - RESPONSIBILITIES OF COORDINATOR AND SUPERVISOR IN A COOPERATIVE ON-THE-JOB TRAINING PROGRAM*

Just as the coordinator has definite responsibilities in teaching his students, so does the on-the-job supervisor have definite responsibilities in teaching his student-learner.

A. What teaching responsibilities does the supervisor have?

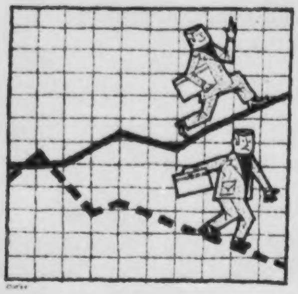
1. Understand the goal of the training program
2. Know units being studied in the classroom
3. Know enough about student-learner to be able to teach him effectively
4. Work in partnership with coordinator
5. Give accurate information about the student-learner to the coordinator
6. Take time to be a teacher
7. Provide "learning by doing" experiences
8. Give support to the F.B.L.A. program
9. Teach specific job skills
10. Teach "values" in human relations
11. Teach technical information
12. Teach business ethics and responsibility
13. Teach policies, systems, methods of training agency
14. Help student develop judgment and a mature outlook

B. How can the coordinator help the supervisor carry out his teaching responsibilities?

1. Develop a plan to follow in training the supervisor
2. Make a training time-table for training the supervisor
3. Set an appropriate place for training sessions with the supervisor
4. Get supervisor into adult classes on "How to Train" and "How to Supervise"

Phase X - Checklist No. 1 - Form D - Continued

5. Develop a "clinic" for supervisors
6. Keep the supervisor's training needs in mind during all coordination activities
7. Invite the supervisor to club activities early in the year
8. Show appropriate film on orientation if available
9. Develop and make available to supervisors reports and records to be used in the program
10. Review unit content throughout the year
11. Develop projects in relation to job and class discussions
12. Give personal data on the student-learner with discretion
13. Interpret school policies
    a. Calendar (vacations, schedules, events)
    b. Regulations
14. Suggest experiences student is ready for in the training agency
    a. Give student an opportunity to learn by doing
    b. Find ways for student to develop in the job assignments
15. Suggest evidences of progress to look for in student's performance
16. Analyze the job in terms of the student's needs for training
    a. Skills
    b. Technical information
    c. Systems, regulations, policies of the company
    d. Physical requirements
17. Suggest additional training directed towards promotional opportunities



*Adapted from Techniques and Coordination Workshop--Richmond Professional Institute

Phase X - Checklist No. 1 - Form E

Form E - TENTATIVE SUPERVISOR TRAINING CALENDAR

These activities can be carried out by personal interviews or at the supervisor's meetings.

AUGUST - SEPTEMBER

Stress advantages of participating
Explain how the Co-op Program works
    Types of students
    Hours a week
    Rate of pay
    Relationships to coordinator and student
    Time and red tape involved
    Credits
    Curriculum overview
    School rules
Discuss Labor Laws involved
Interpret school policies
Introduce techniques of supervision
    Induction
    Morale
Go over content of orientation unit
    Classwork application
    Progress on the job
Review production report and its purpose

OCTOBER - NOVEMBER - DECEMBER

Discuss follow-up as a technique of supervision
Go over contents of unit(s) being studied
    Classwork application
    Progress on the job
Review use and purpose of progress report
Invite to club get-acquainted session
Encourage evaluation by supervisor
    Self evaluation
    Student evaluation
Go over content of unit(s) being studied through Christmas
    Classwork application
    Progress on the job

Phase X - Checklist No. 1 - Form E - Continued

Study ways student may develop on the job
Discuss ways of seeing how student performs
Use supervisor as guest trainer for part-time student-learner employees
Interpret school policies regarding time off for Co-op student-learner employees

JANUARY - FEBRUARY - MARCH

Arrange downtown showing of Co-op film
Enlighten supervisor on club contests
Review progress during the semester
Re-train on progress report
Start How-To-Train class for supervisors
Encourage attendance at employer-employee function
Get participation in F.B.L.A. Leadership Conference
Invite supervisor to cooperate in classroom activity
Give public recognition to supervisor at Employer-Employee Banquet
Re-train on practices needing adjustment
Follow through on "How-To-Train"
Point the way towards permanent employment of Co-op student-learners

APRIL - MAY

Get over-all evaluations
    of student
    of training supervisor
    of cooperative relationships
Clear way for summer employment of Co-op student-learners
Continue to build good relations between supervisor and coordinator

PHASE X - COORDINATION TECHNIQUES

Checklist No. 2 - Orientation of Student-Learner to Cooperative Training Firm

Objective: To develop procedures for orientation of student to the cooperative training firm.

Suggested Activities:

_____ 1. Read carefully Form A concerning the concept of the student-learner's adjustment to a specific work environment.

_____ 2. Refer to pages 24-27 and 34-36 for orientation of student to work responsibilities.

_____ 3. Refer to each student's folder and review strengths and weaknesses in assuming responsibilities and potential.

_____ 4. Review Form B as to how the coordinator may orient student to the training firm.

_____ 5. Conduct one or more of the activities listed on Form B in orienting student to their jobs.

Forms:

A - Adjustment of Student-Learner to a Job Environment

B - Development of Orientation Procedures

Phase X - Checklist No. 2 - Form A

Form A - ADJUSTMENT OF STUDENT-LEARNER TO A JOB ENVIRONMENT

General Information:

The transfer of a student from a theoretical and security oriented classroom to an unknown and threatening work environment is a major change. Insecurity could be caused when the student:

1. has inadequate information concerning job requirments.
2. does not know the standards of work pertaining to quality and quantity for evaluating specific job performance.
3. does not know the risk or consequence of a poor performance.
4. does not know the particular emphasis as specified by the supervisor of the firm for the specific job.
5. does not have the experience in using judgment for making decisions.
6. does not have the experience of depending upon self-image for producing a quality performance.
7. does not possess a receptive spirit of receiving criticism of a consequential nature.
8. does not always have a good attitude toward work.

In addition to specific job requirements, each firm has specific policies which must be known by the student-learner to fulfill adequately his job responsibilities. These policies concern matters such as sick leave, checking in and out of work station, and security measures. These policies often overwhelm the student-learner and may cause apprehension.

A student-learner's success is often measureably contributed to his or her relationship with others including fellow employees and supervisor. Because student-learners have had limited experience, they do not know the importance of good fellow employee and employer relationships. Attempts should be to develop wholesome student-learner attitudes necessary for working with others.

The extent to which an employee will assume responsibility is determined by a number of factors. These can be enumerated as follows:

1. Student Self-Image: Some student-learners have an inferiority complex. On the other hand, some student-learners have a high opinion of themselves than is realistic.
2. Student's Work Ethics: Student-learners may consider the job as requiring so many hours of work rather than developing pride in a quality performance.
3. Student Attitude: The cooperative program as a learning program develops the concept of self-improvement. If students placed in on-the-job training positions are interested in self-improvement, the objectives of the program will be realized.
4. Inadequate Knowledges and Skill Development: This is a matter of placement rather than of orientation.

Phase X - Checklist No. 2 - Form B

Form B - DEVELOPMENT OF ORIENTATION PROCEDURES

In the development of procedures for orienting the student to a work environment three procedures are considered important. They are:

1. Orientation to a work environment is a gradual process involving emphasis in the related class as well as in other vocationally oriented classes.

2. Orientation to a specific job situation will involve specific knowledges about the firm and its firm policies, job requirements, information about firm personnel, and other characteristics about the specific job.

3. Much of the information concerning the firm must be imparted to the student-learner by the job supervisor.

The coordinator will want to discuss with each job supervisor the aspects of orientation to be accomplished by each party, and what information should be considered important enough to be stressed by both the coordinator and the job supervisor. After this has been accomplished, it is then essential for the coordinator to determine how the orientation can be accomplished. Suggested activities are:

1. Student interviews

2. Group conferences for the purpose of orientation

3. Informal student conferences prior to placement

4. Audio visual aids, such as bulletin boards, pamphlets, films, film strips, etc.

5. Discussion class of problem situations

6. Utilization of job summary form

The job summary form is a detailed summary of each job and is filled out by the student-learner toward the end of each training session. It covers topics as the job environment (nature of work, hours, etc.) responsibilities and duties, relationship with other employees, firm policies (leave, privileges, etc.) and philosphy of employer. As an orientation procedure, each new assigned student-learner will read the job summary of the previous student-learner.

The emphasis placed on job orientation is determined by the coordinator. Some students have more difficulty in adjusting than others. It is important, however, to remember that for a large number of students it is a stress situation involving considerable consequence.

PHASE X - COORDINATION TECHNIQUES

Checklist No. 3 - Coordination Through Visitations to Training Firm

Objective: To develop procedures for initiating visitations to training firm.

Suggested Activities:

_____ 1. Read Form A prior to scheduling on-job site visitations.

_____ 2. Read Form B.

_____ 3. Schedule visitations by providing a block of time in daily and weekly work schedule.

_____ 4. Notify job supervisor of impending visitation. (appointment may not be necessary after initial visit.)

_____ 5. Make visitation to training firm. Conduct conferences with job supervisor and informally observe student-learner, if possible.

_____ 6. Summarize the results of visitations as to follow-up conferences with student-learner or job supervisor. Complete Form C after coordinator has returned to the office.

_____ 7. File results of visitations in student-learner's folder.

Forms:

A - Purpose and Frequency of On-Site Visitations

B - Techniques in Observation

C - Summary Form -- On-Site Visitation

Phase X - Checklist No. 3 - Form A

Form A - PURPOSE AND FREQUENCY OF ON-SITE VISITATIONS

A well planned program will not operate by simply placing quality trained students in the right training stations. Perhaps the need for coordination by on-site visitations is apparent when we consider the integral functions the school and the business firm play in the over-all operation of the cooperative program. There must be the utmost cooperation between the educational and training units if the objective of both are to be fulfilled. The school or educational unit is interested in developing skills, knowledges and theory of business operations. The business firm or training unit provides the application of these skills, knowledges, and theory in meaningful production. This integration is accomplished only by close cooperation and coordination of the two units.

The success of a cooperative office education program is on-site visitations. Through on-site visitations, continuous contact is made with the business firm for the purpose of orientation, supervision, evaluation, and direction which are all integral elements in the coordinating function. It is essential that the coordinator not underestimate the importance of on-site training visitations. It is this area where the coordinator can very easily make superficial visitations or no visitations at all. The extent to which a coordinator develops and follows through on all visitations is dependent upon the conscientiousness of the coordinator, his concept of quality supervision, and his professional attitude. It is in this area where the program can be successful or mediocre.

Purposes of On-Site Visitations

The purposes of on-site visitations are numerous. The most common ones are stated below:

1. To determine to what extent the student-learner is achieving the objectives of the program and his career objective.
2. To provide a means of imparting information about the program, student-learner, and training procedures to the job supervisor.
3. To provide a vehicle for the coordinator to learn about the specific operations of the business firm.
4. To serve as a public relations medium in providing a closer relationship between the business community and the school.
5. To provide a medium for assisting the student in self-improvement through evaluation of his/her strengths and weaknesses in a realistic work environment.
6. To provide on-going communications between the school and the business firm essential to the successful operation of a cooperative program.

Need of Visitations

Ideally, the frequency of on-site visitations depends upon two factors: (1) The need to conduct on-going visitations for successfully coordinating the program, and (2) the need for visitations to solve problems arising from irregular situations. It is desirable to discuss both types of visitations.

Irregular Situations Requiring Visitations

Although the general purpose of a visitation to a training station site will be to check the progress of the student-learner, there are problem situations which will demand and require visitations because of their urgency. Such problem situations may be listed as follows:

1. The inability of the student to adjust to the work situation.
2. The placement of the student in a position which does not meet the career objective or for which he/she is not qualified.
3. A personality clash between the student-learner and the job supervisor.
4. Inadequate performance of the student-learner as to quality and quantity of work, attendance, etc.
5. A disgruntled employer who becomes upset with the program.

Such situations will require a total evaluation after all the facts have been determined. The more serious the situation, the more prompt the need for action and the greater the possiblity of a decision with dire consequences. It is very important that all the facts be determined through visitations and conferences with all parties concerned. It is only after a thorough evaluation of these facts that a decision should be made. It may be necessary to place the student under probation, remove him from the training station, or even from the program. However, in most cases, all that will be needed is more constant supervision of the student-learner.

Number of Visitations

To fulfill adequately the role of communication and evaluation of student-learner progress, the coordinator must make a minimum number of visits to the on-the-job training site. The ultimate number of visitations may be determined by a number of student learners. It should be stressed that a minimum number (one per month) of visits should be established as an objective or goal to be achieved.

There are two very important considerations to be given to visitations and their frequency. They are:

1. Too many visitations, as well as no visitations, can be injurious to the program.
2. The number of visitations which the coordinator will need to make to solve the problem.

It is possible for the coordinator to make so many visitations that it becomes a nuisance. The job supervisor is a busy person and does not have the time to have a great many conferences. Fewer meaningful visits are more helpful than many superficial visitations. It is often beneficial for the coordinator to make short visits between longer visitations for purposes of public relations. These visits need only be a few minutes in duration to determine if serious problems do exist. However, these visits should be made in person to the place of business. If possible, try to arrange for a private conversation.

The ultimate goal of the coordinator is to have the job supervisors believe so strongly in the cooperative program that they will contact the coordinator when serious problems exist. This objective takes time and work on the part of the coordinator.

One of the main purposes of visitations is to develop an understanding with the business firm that they are an integral part of the training program. This understanding results only after a threat to the business firm is removed and a free and casual relationship between the coordinator and the business firm is established. Always be certain that a professional as well as friendly relationship exists.

Phase X - Checklist No. 3 - Form B

Form B - TECHNIQUES IN OBSERVATION

Observation as a technique in evaluating the student-learner may be utilized by the coordinator if it is effectively planned. Basic guidelines to consider are as follows:

1. The purpose of the visitation should be established and the role that observation will play in achieving that purpose.
2. A determination of what facts are to be obtained through observation.
3. Generally, it is more effective to limit the number of facts to be obtained in observation.
4. Observation of a single situation is often not valid as to work performance.
5. Observation checklists are to be used as guides and need not be utilized in all cases.
6. Observation should be considered as only one method of obtaining information.
7. Facts obtained from the observation should be supplemented with others prior to making an evaluation judgement.

Phase X - Checklist No. 3 - Form C

Form C - SUMMARY FORM -- ON-SITE VISITATION

Date: ______________________ Place: ______________________

Job Supervisor: ______________________

Student-Learner: ______________________

Reactions of Job Supervisor: ______________________

Reactions of Coordinator: ______________________

Suggested Follow-Up: ______________________

157

Phase X - COORDINATION TECHNIQUES

Checklist No. 4 - Conference With Job Supervisor

Objective: To develop guidelines for scheduling and implementing conferences with job supervisors.

Suggested Activities:

_____ 1. Tentatively plan a monthly schedule of visits, making appointments in advance.

_____ 2. Refer to Form A on suggested procedures for contacting job supervisors.

_____ 3. Keep a current record of each visit in a pocket notebook from which the coordinator can make notations in student-learner's file.

Forms:

A - Job Supervisor Interviews

B - Suggested Guidelines for Supervision Interviews

Phase X - Checklist No. 4 - Form A

Form A - JOB SUPERVISOR INTERVIEWS

I. Secure background data on supervisor

  A. When? Before first call.

  B. Where? From management or from advisory committee or alumni of program.

  C. What? Job responsibilities.

II. Make arrangements for call

  A. Select a convenient hour for both parties.

  B. Set up a weekly coordination schedule.

  C. Plan to accomplish definite objectives.

III. Define the cooperative program

  A. If this is the first contact with the current supervisor, explain the objectives and workings of the entire program.

  B. If supervisor indicates an understanding of the program, tactfully question him to indicate if his understanding is complete.

  C. Refer to local business firms which are participating in the cooperative program.

IV. Be considerate of supervisor's time

  A. Avoid rush periods, if possible.

  B. Return at a later time if an emergency rush is observed.

Phase X - Checklist No. 4 - Form B

Form B - SUGGESTED GUIDELINES FOR SUPERVISOR INTERVIEWS

I. Initial contact with supervisor should be arranged by management.

   A. In this way, superviosr will understand that the program has the official support of the company.

   B. Preliminary contact should be for the purpose of thoroughly orienting the supervisor to the cooperative program.

II. Ask pointed questions and have the supervisor do a good deal of the talking so that you are sure that the program is understood.

III. Affect the training plan during the first or second call.

   A. Stress the fact that this is a training situation and ask for as much rotation as possible.

   B. Do not give the impression that you will accept work stations that will not provide adequate training.

IV. Summarize what will be taught in the related class.

   A. Emphasize how this may shorten training time.

   B. In problem situations, withhold judgment until all facts are in.

V. Plan the call for a definite purpose and terminate it promptly.

   A. State problem briefly.

   B. Ask about specific skills.

   C. Be objective in requesting information.

VI. Plan interview away from work situation occasionally.

   A. Discuss matters over a cup of coffee.

   B. Discuss matters at lunch sometime.

VII. Plan discussion follow-up.

   A. Bring back praise of administrators or teachers.

   B. Bring back suggestions as tactfully as possible.

   C. Assure the supervisor that you will find out about questions you cannot answer.

   D. Keep conversation on a professional basis and safeguard confidential information.

PHASE X - COORDINATION TECHNIQUES

Checklist No. 5 - Conference With Student-Learner

Objective: To establish guidelines for coordinator/student-learner conferences.

Suggested Activities:

_____ 1. Arrange initial interview with student and parents. See Form A.

_____ 2. Confer with student-learner at least three times during a six-weeks period. Refer to weekly reports turned in by student. See Phase VII forms

_____ 3. Adjust to problem situations which may arise by conferring with student-learner. A three-way conference may be arranged. See Checklist No. 6 of this Phase.

_____ 4. Ask the student to evaluate him or herself at the end of each grading period. See Phase XIII, pages 173 and 174.

_____ 5. Discuss student's progress as determined by observation, employer rating, and self-evaluation.

Forms:

A - Counseling With Students and Parents

B - Adjusting to Problem Situations

161

Phase X - Checklist No. 5 - Form A

Form A - COUNSELING WITH STUDENTS AND PARENTS

1. Plan the conference.
    a. To be individual or joint.
    b. Along lines of their interest.
    c. To secure their participation and any contribution they make.

2. Hold pre-enrollment conferences.
    a. To be sure of their understanding of the program and its operation.
    b. To determine student's ambitions and interests and parents' ideas about them.
    c. To judge amount of support to be obtained from the home.

3. Hold conferences during student's enrollment in the program.
    a. To inform them of progress.
    b. To work out problems if they arise.
    c. To keep cooperation between home and school.
    d. To explain necessary transfers.
    e. To help plan further education or training.

4. Confer after graduation.
    a. As a part of the follow-up.
    b. To maintain rapport with the school.

Phase X - Checklist No. 5 - Form B

Form B - ADJUSTING TO PROBLEM SITUATIONS

1. Determine just what the problem is
    - a. By questioning supervisor
    - b. By questioning trainee
2. Summarize the facts
    - a. To separate conflicting opinions
    - b. To avoid jumping to a conclusion
3. Try to determine cause(s) of problem
    - a. Misunderstanding
    - b. Failure of trainee to do work properly
    - c. Attitude difficulty
    - d. Failure of supervisor to teach necessary job requirements or to inform student of skill application
    - e. Student's schedule conflicts
    - f. Violation of law or training agreement
    - g. Other employees at fault

4. Plan alternatives
    - a. Thorough review and analysis of all facts
    - b. Of what you think will be feasible
    - c. In cooperation with supervisor
    - d. According to policy of firm and training program
5. Work out solution if possible
    - a. Be tactful, friendly, but firm with all concerned
    - b. Transfer student only as a last resort
    - c. Follow-up action taken

PHASE X - COORDINATION TECHNIQUES

Checklist No. 6 - Utilization of Three-Way Conferences: Coordinator, Supervisor, and Student-Learner

Objective: To detail procedures for effectively utilizing the three-way conference.

Suggested Activities:

_____ 1. Read carefully Form A, which concerns the use of the conference.

_____ 2. Read Form B, which deals with conducting the conference.

_____ 3. Utilize Form C, which is an example of an evaluation of a conference.

_____ 4. File results of the evaluation for future reference.

_____ 5. Follow-up on the three-way conference.

PLEASE FILE THIS

Innovative Activities:

_____ 1. Role playing activity at Advisory Committee meeting to point out need for three-way conference.

_____ 2. Utilize Form C with comments by job supervisor.

Forms:

A - The Purpose and Frequency of the Three-Way Conference

B - Conducting the Three-Way Conference

C - Evaluation of the Three-Way Conference

Phase X - Checklist No. 6 - Form A

Form A - THE PURPOSE AND FREQUENCY OF THE THREE-WAY CONFERENCE

Purpose:

The main purpose of the three-way conference is to facilitate communication among different individuals for the purpose of problem solving. While the two-way conference between coordinator and student or job supervisor is for various purposes, such as public relations, the three-way conference is usually for problem solving. The problem may only be to insure that all individuals involved understand certain procedures or information and, therefore, no decision need be made in such situations. Other situations will require that alternatives be explored and definite decisions concerning them be determined.

The three-way conference results when three individuals playing different roles meet and discuss a problem situation in which it necessitates composite deliberation by all of them for effective solving of that problem. For instance, a misunderstanding between the student and the job supervisor affecting their working relationship might require a three-way conference. The three-way conference can often solve a serious problem much more expediently than the use of a two-way conference. However, if the situation can be solved by the use of a two-way conference, it should be utilized.

The major benefit to be derived from a three-way conference is a better understanding between the job supervisor and the coordinator. This results from both working side by side attempting to solve a problem.

Respect and consideration for each will result.

Specific Situations Utilizing the Three-Way Conference

The use of the three-way conference between the coordinator, student, and job supervisor is at the discretion of the coordinator. This conference takes planning and it is necessary to have all participants free for a block of time. It can be used effectively by the coordinator in such situations:

1. Unacceptable performance on the job by the student.
2. Refusal of student to follow instructions of job supervisor.

3. Gross negligence of student in performance of duties.
4. Necessity to inform both job supervisor and student of regulations and requirements, such as training plan.
5. Gross misunderstandings between job supervisor and student-learner, of duties and responsibilities.
6. Those situations involving evaluation of student-learner with marginal ability.

The two-way conference may be necessary to obtain the facts of the situation prior to the utilization of the three-way conference.

Frequency of the Conference

No definite policy or guideline can be stated in regards to the frequency of the three-way conference. The coordinator should not hesitate to use this technique to solve a problem rather than to permit the problem to grow.

Phase X - Checklist No. 6 - Form B

Form B - CONDUCTING THE THREE-WAY CONFERENCE

Prior to conducting the three-way conference, it is important to obtain and evaluate the facts and then define the problem. The coordinator should then do the following:

1. Define the problem.
2. Determine what the alternatives are for solving the problem.
3. Determine what would be the best alternative for solving the problem.

If the coordinator has difficulty defining the problem and determining the cause of the problem, it may be wise to use the first few minutes to explore the situation. Other considerations for the coordinator when conducting a three-way conference are:

1. Be cordial to student-learner and job supervisor.
2. Express a concern and show interest for assisting student-learner.
3. Attempt to establish the correct atmosphere by stating why the meeting was called. If the problem definitely is known, it can be stated.
4. Provide and encourage discussion on the various aspects of the problem.
5. Lead the discussion into the various alternatives. The student may be asked to indicate an alternative.
6. A firm, positive decision should be made if the situation demands one.
7. Some indications should be made of the follow-up.
8. Have a positive, friendly closing.

167

Phase X - Checklist No. 6 - Form C

Form C - EVALUATION FORM OF THREE-WAY CONFERENCE

Date: ______________________ Firm: ______________________

Job Supervisor: ________________ Student: ________________

Problem Identification: ____

____

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Discussion and Comments: ____

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____

____

Decision: ____

____

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Follow-up: ____

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____

PHASE XI

ADVISORY COMMITTEE

PAGE

1. The Nature and Functions of an Advisory Committee 139
   - A. The Nature and Role of an Advisory Committee in Office Education 140
   - B. Functions of Effective Advisory Committees........... 142
   - C. Sources of Information About Advisory Committees ... 143
   - D. Sample Brochures...................................... 145
   - E. Planning Sheet for Advisory Committees 149
   - F. Suggested Agenda for First and Second Meetings 150
   - G. Certificate of Appreciation for Advisory Committee Member 151

PHASE XI - ADVISORY COMMITTEE

Checklist No. 1 - The Nature and Functions of an Advisory Committee

Objective: To develop an understanding of the nature and functions of the advisory committee.

Suggested Activities:

_____ 1. Obtain background and organizational information about advisory committees. See Form A.

_____ 2. Refer to Form B for functions of advisory committee.

_____ 3. For further information, refer to Form C concerning sources of information about advisory committees.

_____ 4. Determine the needs of an advisory committee.

_____ 5. Determine areas of concern and functions of the committee.

_____ 6. Utilize Form C, which is a planning sheet for planning the role of the committee.

_____ 7. Inform the school administration of pending plans.

_____ 8. Plan carefully the first and second meetings. See Form F.

_____ 9. Present members with certificate of appreciation. See Form G.

Forms:

A - The Nature and Role of an Advisory Committee in Office Education

B - Functions of Effective Advisory Committees

C - Sources of Information About Advisory Committees

D - Sample Brochures

E - Planning Sheet for Advisory Committees

F - Suggested Agenda for First and Second Meetings

G - Certificate of Appreciation for Advisory Committee Member

Phase XI - Checklist No. 1 - Form A

Form A - NATURE AND ROLE OF AN ADVISORY COMMITTEE IN OFFICE EDUCATION

Definition of an Advisory Committee:

A committee invited to advise the teacher in the development and maintenance of a local vocational program. The committee acts in a consultative capacity and is responsible for making recommendations and suggestions to school authorities empowered to act upon the advice offered. The board of education remains the governing board and establishes policy.

Types of Advisory Committees:

GENERAL ADVISORY COMMITTEES--assist in the development, maintenance, and coordination of a total vocational program for a school or school district. It helps to: (1) discover the training needs of the service area to ensure a realistic and practical program, (2) develop community understanding of vocational education, and (3) provides support for vocational education to build respect and prestige for the school. (10 to 20 members)

DEPARTMENTAL ADVISORY COMMITTEES--serve a single department's vocational program such as office education, agriculture-related programs, wage-earning homemaking programs, distributive education, or trade and industry. (5 to 9 members)

SINGLE-FIELD COMMITTEES--assist in the development of realistic programs in a very specific area such as accounting, secretarial training, or data processsing. (5 to 9 members)

Membership of Committee

The following considerations are important in selecting advisory committee members:

1. Experience: A committee member must have had recent, successful, first-hand practical experience in the occupational area which the committee is to serve.

2. Available Time: A committee member must be available for all meetings of the committee.

3. Type of Person: The person should be enthusiastic about his vocation. A committee member must be responsible, civic-minded, and cooperative. The most aggressive and ambitious person does not always make the best committee member nor does one concerned with only the selfish interests of a small group.

4. Community Representation: Membership must be representative of the employment community or area. Both men and women should serve on the committee. Community groups to be considered include:

   Employers
   Employees (including mid-management)
   Vocational or Technical School Personnel
   Clergy
   Recent graduates of the program (if not a new program)
   Parents
   Organized Labor
   Civic Clubs
   Professional Clubs
   Chamber of Commerce
   Press, Radio, TV
   North Dakota State Employment Service

   Members selected may represent more than one group (eg. employers, professional club, parents).

Number of Members:

The size of the committe should be decided by local school. A good rule of thumb is not less than three or more than nine.

Length of Service:

Members are generally invited to serve for three-year terms. Replacements should be staggered so there are always some experienced members left on the committee. One plan is to replace 1/3 of the members each year.

Appointment of Committee Members:

The professional staff person who works most closely with an advisory committee should have the authority to select and/or recommend committee members. HOWEVER, FINAL AUTHORITY FOR APPROVAL OF APPOINTMENTS ALWAYS REMAINS WITH THE BOARD OF EDUCATION. A formal invitation to serve of an advisory committee must always come from the Board or its designated representative (usually the Superintendent of Schools). An invitation to serve coming from the Superintendent of Schools lends an additional air of importance to the call.

Number of Meetings:

There is no generally accepted policy on the maximum number of meetings to be held each year. Meetings may be called at regular intervals or at times when there is a felt need. Committees that are active and involved usually meet more frequently than those which are only formed to satisfy federal program requirements. Communicate with committee members between meetings to ensure that they are kept fully informed and up to date on what is happening in the program.

Phase XI - Checklist No. 1 - Form B

Form B - FUNCTIONS OF EFFECTIVE ADVISORY COMMITTEES

Effective advisory committees are needed in every major vocational area. They often have functions as follows:

a. To speak on behalf of employers and employees from specific occupational areas.

b. To serve as a communication channel between the school and occupational groups in the community.

c. To list the specific skills and suggested related and technical information for the program and courses required for entry into and promotion within a career area.

d. To advise on the type of skills, knowledges, and attitudes needed to prepare student for entering into a specific occupation.

e. To recommend physical facilities and types of equipment needed for a specific occupational program.

f. To make suggestions which will promote and assure the highest quality program.

g. To recommend standards of competency and achievement which are necessary for entry into employment and promotion within an occupational area.

h. To recommend competent personnel with appropriate educational, business, and industrial experience as potential instructors or administrators.

i. To assist with an evaluation of the program of instruction.

j. To suggest ways for improving the dissemination of program information to potential student and employers.

k. To assist in recruiting potential students, providing internships, and in locating appropriate jobs for qualified graduates.

l. To keep the school or college informed on current specific needs and changes in the labor market.

m. To provide a means for the school or college to inform the community of needed occupational programs.

n. To assess program needs in terms of the needs of the community.

o. To assist in long-term program planning.

Phase XI - Checklist No. 1 - Form C

Form C - SOURCES OF INFORMATION ABOUT ADVISORY COMMITTEE

Many sources are available which explain the nature and purpose of advisory committees. The most valuable ones would include the following:

1. North Dakota State Advisory Council for Vocational Education. Advise for Action: Vocational Education Advisory Committee Handbook. North Dakota State Board for Vocational Education.
2. Mitchell, B. "Rockford's Remarkable Advisory Council." (CETA Programs.) Worklife, (Spring, 1977), 2: 24-5.
3. Fox, H. W. "Advisory Board: Resource for Closely Held Companies." Michigan State University Business Topics. (Summer, 1979) 27:25-30.
4. "Advisory Council to Back Up the Board." Business Week, (November 12, 1979), p. 131-2.
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6. "Federal Savings and Loan Advisory Council." il. The Federal Home Loan Bank Board Journal. (Spring, 1978), 11:21-3.
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Phase XI - Checklist No. 1 - Form D
Form D - SAMPLE BROCHURES (A)

EVERYTHING YOU WANTED TO KNOW ABOUT VOCATIONAL EDUCATION ADVISORY COMMITTEES – BUT WERE AFRAID TO ASK!

1

JUST WHAT IS A VOCATIONAL EDUCATION ADVISORY COMMITTEE?

A Vocational Education Advisory Committee is a group of people selected by the Vocational Education staff and School Administration, with the approval of the Governing Board of Education, to advise the school on matters related to Vocational Education. The members of the Vocational Education Advisory Committee are persons representing business, industry, labor, agriculture, and education. The members are selected because of their expertise and knowledge about an occupational area.

2

WHAT TYPES OF VOCATIONAL EDUCATION ADVISORY COMMITTEES ARE THERE?

1. General Vocational Education Advisory Committees are concerned with matters related to the total **vocational education program** in a community or institution.
2. Vocational Education Program Advisory Committees are concerned with matters related to **one specific vocational program** in Agriculture, Business and Office Occupations, Distributive Education, Health Occupations, Consumer and Homemaking, Occupational Home Economics, Trade and Industry, Technical and Apprenticeship Programs.
3. Ad Hoc Advisory Committees are appointed to serve one particular purpose and the committee is terminated when the purpose or objective of the committee is achieved.
4. Statewide Vocational Education Program Advisory Committees are selected to advise the person that has the responsibility for the supervision of a specific vocational education program area on a statewide basis.
5. State Advisory Council for Vocational Education. The members are appointed by the Governor of the State to meet the mandate of Public Law 94-482. The law requires that each state have an advisory council if the state is to be eligible to continue to receive federal appropriations for vocational education.

3

WHAT ARE VOCATIONAL EDUCATION ADVISORY COMMITTEE MEMBERS ASKED TO DO?

- Conduct Surveys to Determine Vocational Education Needs and Interests.
- Supply Information on Jobs and Career Opportunities.
- Provide Realistic Advice on Curriculum (Course) Development and Instructional Materials and Aids.
- Help Recruit and Provide Assistance to Vocational Education Teachers.
- Assist in Developing Student Selection Criteria.
- Assist Students Through Scholarships and Awards.
- Support Student Vocational Education Organizations.
- Assist in Job Placement Activities.
- Promote Vocational Education Programs in the Community.
- Support Vocational Education Legislation at the Local, State and National Levels.
- Review and Recommend Improvements in Facilities and Equipment Needed for the Vocational Program.
- Assist in the Evaluation of Vocational Education Programs.
- Make and Communicate recommendations to the Appropriate Governing Board that will Enhance Vocational Education.

4

WHAT IS IN IT FOR YOU?

Serving on a vocational education advisory committee can be an extremely rewarding experience. One or more of the reasons listed below may be your reason for serving.

1. Business, Industry and Agriculture pay a large share of the taxes that support vocational education activities. By serving on an advisory committee, you can have a part in determining how effectively funds are being utilized.
2. The product of vocational education is persons with job entry skills and knowledge. By serving on an advisory committee you can advise the program on the relevancy of the program.
3. Your company or organization will have the prestige of having an employee involved in a meaningful public service activity.
4. The personal satisfaction of having your knowledge and expertise recognized.
5. The personal satisfaction of involvement in the educational process.

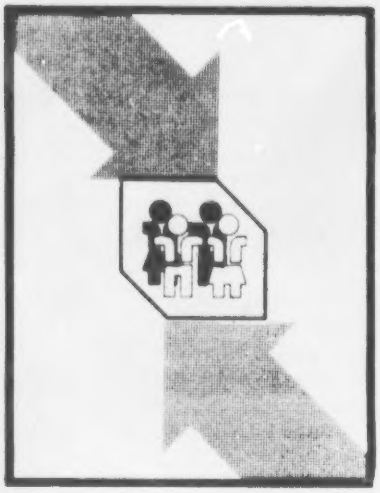
5

WHAT IS IT ALL ABOUT?

You have been selected as a member of a local vocational education program advisory committee. Your expertise, knowledge and experience will be extremely valuable to the program instructor and the school. Your contributions will assist the school in the proper preparation of students in the occupational field of their choice. Vocational Education students must be prepared to compete in the job market, find and hold employment in their chosen field, be able to progress on the job and be a productive member of our society. Advisory committee members, individually and collectively can play a key role in helping students to achieve these goals.

What the advisory committee will do and how effective it will be depends on how well you as a member make it work. As a member of a vocational education advisory committee, you play a key role in the future of vocational education and the quality of life in your community and our country.

THANK YOU FOR SERVING AS A VOCATIONAL EDUCATION ADVISORY COMMITTEE MEMBER, AND FOR YOUR CONTRIBUTION OF TIME AND EXPERTISE IN MAKING VOCATIONAL EDUCATION A MEANINGFUL EDUCATIONAL PROGRAM IN YOUR COMMUNITY AND THE STATE OF NORTH DAKOTA.

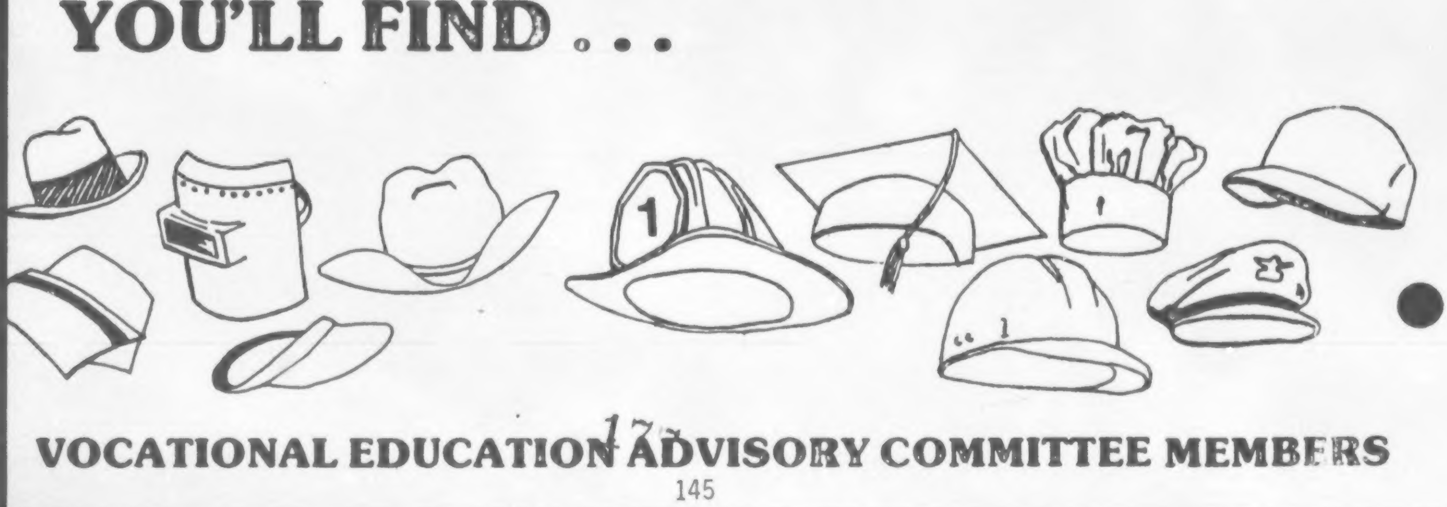


IF YOUR ADVISORY COMMITTEE NEEDS TECHNICAL ASSISTANCE ON MATTERS RELATED TO VOCATIONAL EDUCATION ADVISORY COMMITTEES CONTACT:

North Dakota State Advisory Council for
Vocational Education
State University Station — Box 5405
Fargo, North Dakota 58105
(701) 237-8935

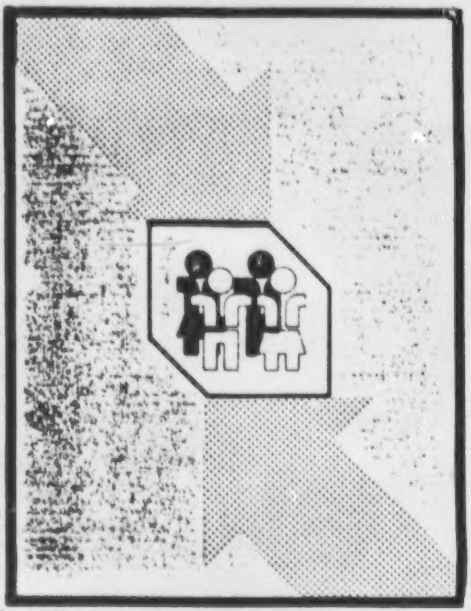
North Dakota State Board for
Vocational Education
State Office Building
900 East Boulevard
Bismarck, North Dakota 58505
(701) 224-2259

UNDER MANY DIFFERENT HATS, YOU'LL FIND . . .



VOCATIONAL EDUCATION ADVISORY COMMITTEE MEMBERS

Phase XI - Checklist No. 1 - Form D
Form D - SAMPLE BROCHURES (B)



For Additional Information Contact:

NORTH DAKOTA STATE
ADVISORY COUNCIL FOR
VOCATIONAL EDUCATION
State University Station - Box 5405
Fargo, ND 58105
(701) 237-8935

NORTH DAKOTA STATE BOARD
FOR VOCATIONAL EDUCATION
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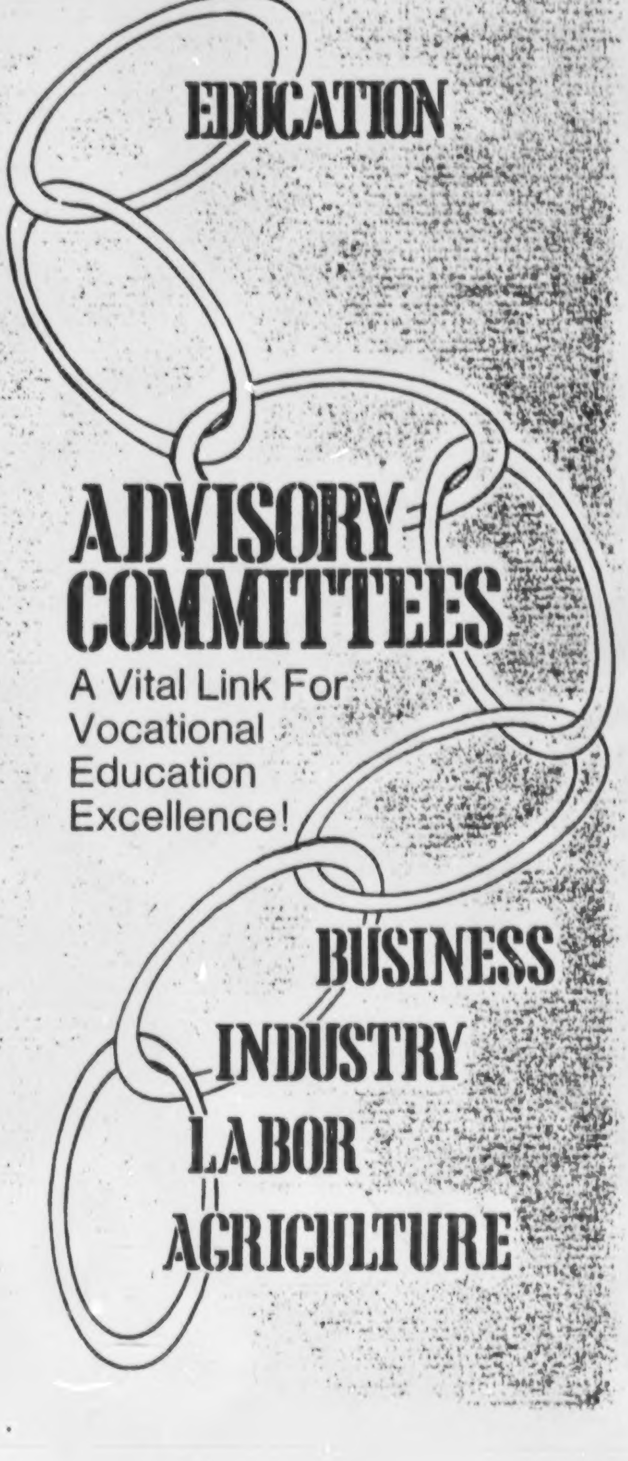


EDUCATION

ADVISORY COMMITTEES

A Vital Link For
Vocational
Education
Excellence!

BUSINESS
INDUSTRY
LABOR
AGRICULTURE

HOW ADVISORY COMMITTEES CAN BENEFIT YOUR SCHOOL AND YOUR VOCATIONAL EDUCATION PROGRAMS

1. Community and Public Relations assist in the promotion of school programs and projects for the enhancement of the total school system.

2. Assist in the development of vocational education curriculum. Free consultants for your vocational education teachers.

3. Provides the school with information on the trends in business, industry, labor and agriculture.

4. Assist in short and long range vocational education program planning and implementation.

5. Promote vocational education and the commumity based education concept.

6. Assist in the development and passage of favorable legislation for education.

7. Advise on facilities and equipment needs for Vocational Education Programs.

8. Obtain community resources for the school . . . equipment, speakers, part and full time employment opportunities.

9. Assist in conducting community surveys to determine vocational education interest and needs.

10. Assist in the evaluation of vocational education program effectiveness.

Problem:

Securing the support of Business, Industry, Labor and Agriculture on school related projects, activities and issues.

Solution:

Ask people from Business, Industry, Labor and Agriculture to become involved by serving on Vocational Education Advisory Committees.

Results:

Assistance from Business, Industry, Labor and Agriculture in the development of quality vocational education programs and the enhancement of your total educational program.

Phase XI - Checklist No. 1 - Form E

Form E - PLANNING SHEET FOR ADVISORY COMMITTEE

Instructions: The following items should be completed by the coordinator prior to contacting any members.

I. Functions of the advisory committee

   A.
   B.
   C.

II. Areas of concern for committee (order of priority)

   A.
   B.
   C.

III. Committee members (tentative)

   A.
   B.
   C.
   D.
   E.
   F.
   G.

IV. Organization of committee - calendar, tentative dates

   A. Contact and consent of committee members ____________________

   B. First meeting date ____________________

   C. Items to be discussed at first meeting

      1.
      2.
      3.
      4.

Phase XI - Checklist No. 1 - Form F

Form F - SUGGESTED AGENDA FOR FIRST AND SECOND MEETINGS OF COMMITTEE

Planning Checklist for First Meeting

1. Reserve meeting room.
2. Prepare agenda.
3. Notify members of meeting time and date.
4. Include agenda with notice.
5. Prepare materials to be discussed.
6. Recheck to see that meeting room is reserved.

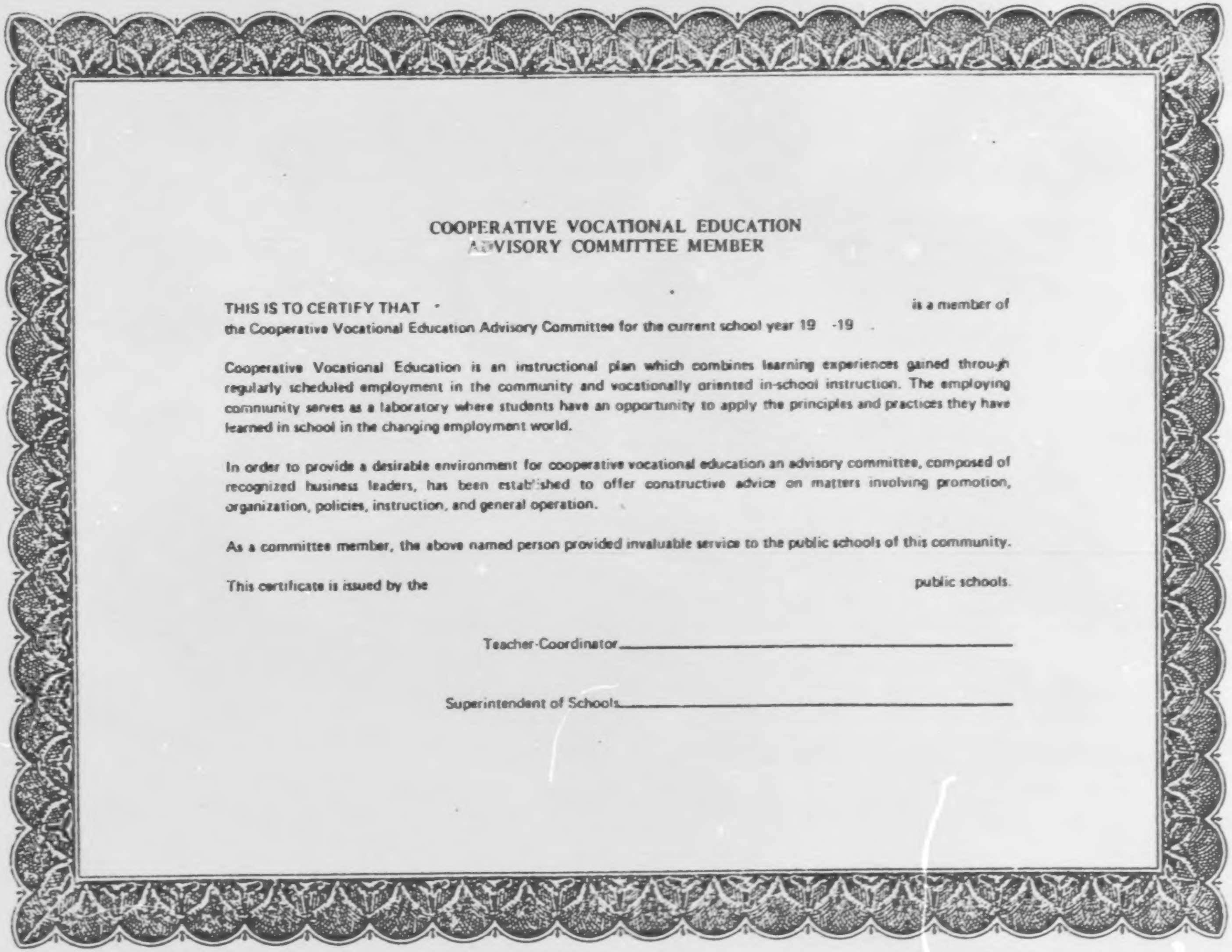
First Meeting Agenda

1. Department head or coordinator serves as temporary chairman and appoints temporary secretary.
2. Introduce all persons present.
3. Department head or coordinator explains the concept of an advisory council and the activities with which it will be concerned.
4. A representative of the Board of Education, possibly the superintendent, informs committee of their relationship to the school. Duplicated copies of the School Boards statement of policy may then be handed out.
5. The temporary chairman may distribute a sample of rules of operation, such as:
    a. Time and length of meetings.
    b. Method of notifying members.
    c. Method of calling special meetings.
    d. Method of developing agenda for meetings.
6. The temporary chairman suggests program areas most urgently in need of immediate study.
7. The council sets date, time, and place of next meeting indicating that permanent officers will be elected at that time.
8. Tour of facilities.
9. Meeting adjourns.

Second Meeting Agenda

1. Temporary chairman calls meeting to order.
2. Roll call by temporary secretary.
3. Minutes.
4. Election of permanent officers. (Temporary officers serve until end of meeting.)
5. Set of permanent rules of operation which should include set meeting time, place, and dates.
6. Plan long-range program of work.
7. Set up priority of areas to be considered.
8. Arrange for executive committee meeting before next regular meeting.
9. Explanation of present educational program.
10. Adjourn.

Form G - CERTIFICATE OF APPRECIATION - ADVISORY COMMITTEE MEMBER



COOPERATIVE VOCATIONAL EDUCATION
ADVISORY COMMITTEE MEMBER

THIS IS TO CERTIFY THAT is a member of the Cooperative Vocational Education Advisory Committee for the current school year 19 -19 .

Cooperative Vocational Education is an instructional plan which combines learning experiences gained through regularly scheduled employment in the community and vocationally oriented in-school instruction. The employing community serves as a laboratory where students have an opportunity to apply the principles and practices they have learned in school in the changing employment world.

In order to provide a desirable environment for cooperative vocational education an advisory committee, composed of recognized business leaders, has been established to offer constructive advice on matters involving promotion, organization, policies, instruction, and general operation.

As a committee member, the above named person provided invaluable service to the public schools of this community.

This certificate is issued by the public schools.

Teacher-Coordinator____________________

Superintendent of Schools____________________

PHASE XII

STUDENT ORGANIZATIONS

PAGE

1. Nature and Functions of Student Organizations for Office Education 152
    A. Nature and Functions of Student Organizations 153
    B. Planning Sheet for Student Organizations 156
2. Organization of a Student Club.......................... 157
    A. How to Organize a Local Chapter 158
    B. What Goes Into a Club's Bylaws 160
    C. Bylaws Checklist..................................... 161
    D. Suggested Club Activities 162
    E. Evaluate Your Student Organization.................. 165
3. Development of a Yearly Student Club Calendar 168
    A. Long-Range Plan for Student Club 169
    B. Illustration of Yearly Student Club Calendar 170

PHASE XII - STUDENT ORGANIZATIONS

Checklist No. 1 - Nature and Functions of Student Organizations for Office Education

Objective: To determine the nature and values of student organizations.

Suggested Activities:

_____ 1. Read Form A.

_____ 2. For further information refer to Form B, which deals with sources of information on student organizations.

_____ 3. Determine the needs, objectives, and functions of a student organization. Use Form C, which is a planning sheet for a student organization.

_____ 4. Inform and secure approval of school administration for implementing student organization.

_____ 5. Refer to "Guide for Integrating FBLA Into the Classroom".

Innovative Activities:

_____ 1. Check with other coordinators who have worked successfully with student organizations.

_____ 2. Obtain information about student organizations from State Director of Office Education.

MEETING
NOTICE!

Forms:

A - Nature and Functions of Student Organizations

B - Planning Sheet for Student Organizations

Phase XII - Checklist No. 1 - Form A

Form A - NATURE AND FUNCTIONS OF STUDENT ORGANIZATIONS

Introduction:

For many teachers, the advisement and sponsorship of a student club is just one additional responsibility with more headaches. This negative attitude can defeat the growth of the student organization before it gets much of a start. The success of a student organization is often directly related to the interest and enthusiasm of the advisor. In fact, it is difficut to visualize an effective student organization without an active and interested coordinator advisor.

The advisor's job is to advise. Advise means to guide and suggest possible alternatives of action and to assist students in weighing those alternatives. If the advisor dictates all action, the purpose of the organization will be defeated. The advisor must recognize new ideas by the organization's members and compliment them on so doing, although they may have little merit.

To be realistic, an advisor to a student organization will admit that at time the job is both trying and defeating. The coordinator should understand the assumptions underlying the nature and functions of a student organization to fulfill the role as an advisor. Specific assumptions are:

1. Student leadership and participation will vary from year to year. Any organization depends to a great extent upon the membership.
2. The quality of student participation is affected by student personalities. A student with a dominant personality can adversely affect the other students either negatively or positively.
3. The purposes of the organization should be limited in number and should be communicated to the membership.
4. A student organization must be considered a learning device.
5. The coordinator advisor should take the necessary steps to keep the yearly activity plan on schedule. Students can easily postpone completing extracurricular activities because of the pressure of school work and other activities. It is, therefore, necessary for the coordinator to encourage students to complete assigned tasks on time.

Certain principles are important in organizing and supervising student organization activities. A list of selected principles could include the following:

1. Each activity should serve a definite purpose.
2. All activities should provide an opportunity for all students to participate.
3. All activities should be under faculty supervision.
4. Specific activities involving outsiders should receive administrative and/or teacher approval.
5. Student time, expense, and efforts should be considered when planning the activity calendar.
6. Activities should be so organized that they perpetuate participation of all students rather than just a few students.
7. Any activity which terminates prior to fulfilling its purpose, should be evaluated by students and supervisor.
8. Students should be responsibile to a student leader and the student leader responsible to the advisor.
9. Supervision of student activities should be as limited as possible.

Purposes and Functions of Student Organization

Purposes and functions of student organizations vary. Purposes can be delineated as those indicated by the Handbook* of the Future Business Leaders of America--Phi Beta Lambda, Inc., as follows:

a. Develop competent, aggressive business leadership.

b. Strengthen the confidence of young men and women in themselves and their work.

c. Create more interest and understanding in the intelligent choice of business occupations.

d. Encourage young men and women in the development of individual projects.

e. Encourage young persons to improve the home and community.

---

* Future Business Leaders of America - Phi Beta Lambda, Inc., Handbook, p. 7.

187

f. Participate in worthy undertakings for the improvement of business and the community.

g. Develop character, prepare for useful citizenship, and foster patriotism.

h. Participate in cooperative effort.

i. Encourage and practice thrift.

j. Encourage improvement in scholarship and promote school loyalty.

k. Improve and establish standards for entrance into business occupations.

Student Responsibility in Fulfulling Functions of Student Organization

A code of ethics is often stressed to indicate the responsibility of the student as a member of the organization. These are explicitly stated in the Handbook* as follows:

a. I will be honest and sincere in all my business dealings.

b. I will approach each task with confidence in my ability to perform my work at a high standard.

c. I will willingly accept responsibilities and duties assigned to me.

d. I will respect my employer and fellow workers and be considerate of them.

e. I will seek to profit by my mistakes and take suggestions and criticisms directed toward the improvement of myself and my work.

f. I will, to the best of my ability, abide by the rules and regulations of my employer.

g. I will exercise initiative and responsibility and will cooperate with my employer and fellow employees.

h. I will dress and act in a manner that will bring respect to me and to my employer.

i. I will use my time to the best advantage of my employer.

j. I will seek to improve my community by contributing my efforts and my resources to its worthwhile projects.

---

* Future Business Leaders of America - Phi Beta Lambda, Inc., Handbook, p. 7.

Phase XII - Checklist No. 1 - Form B

Form B - PLANNING SHEET FOR STUDENT ORGANIZATION

I. Functions of student organization

A.

B.

C.

II. Student organizations which can be selected

A.

B.

C.

III. Tentative plans for organization — Date

A. Approval by school administration ____________

B. Selection of student group ____________

C. First meeting date ____________

D. Election of temporary officers ____________

E. Appointment of committees ____________

F. Adoption of yearly plan ____________

G. Finalization of constitution ____________

PHASE XII - STUDENT ORGANIZATION

Checklist No. 2 - Organization of a Student Club

Objective: To set up guidelines for an effective student club.

Suggested Activities:

_____ 1. Plan preliminary steps to be taken for laying the groundwork for organizing a student club. See Form A.

_____ 2. Develop a clear-cut, concise constitution so that the club can function effectively.

   a. Form B suggests an outline of a constitution.
   b. Form C is a checklist of problem areas which might be encountered in the operation of a student organization. Provision should be made in the constitution to reduce these unnecessary problems.

_____ 3. Set up a pattern for a good club meeting. A basic pattern which can be used is as follows:

   a. 10 minutes of fun, so members will want to attend.
   b. 25 minutes of purposeful activity to make the meeting worthwhile.
   c. 10 minutes of planning to give the club definite purposes.

_____ 4. Refer to "Suggested Agenda for Chapter Meetings" FBLA-PBL Handbook-Appendix 3. Plan fund raising, social, educational, public relation, and community service projects. Emphasize quality. See Form D.

_____ 5. Evaluate club once or twice a year. See Form E for an example of an evaluation form taken from the Office Education Association Handbook.

Forms:

A - How to Organize a Local Chapter

B - What Goes Into a Club's By-Laws

C - By-Laws Checklist

D - Suggested Club Activities

E - Evaluate Your Student Organization

!!!
MEETING
NOTICE

Phase XII - Checklist No. 2 - Form A

Form A - HOW TO ORGANIZE A LOCAL CHAPTER

When any group in a school decides to organize a club, many things must be thought out in advance. Organizing the local chapter should not be a haphazard process, but should follow definite steps. Below are some suggested steps to follow:

1. Write to advisors of nearby chapters for information and available material about organizing a chapter.
2. Consult with the administration, the office occupations advisory committee, and others about the values of such student organization for the students.
3. Introduce the topic of the student group to the office education class (perhaps the students have already been asking about the chance of organizing such a group). Inform the students about the activities of other chapters, invite speakers from nearby chapters, arrange for students to visit a nearby chapter, and show the emblem, pin, scrapbook, etc. of other chpaters.
4. Discuss with the students the values of organizing a student group and provide them with important information such as the history, purposes, and examples of activities of the two national office education student groups.
5. After these preliminary steps have been taken, the students should form a committee to review the matter further and to recommend the organization with which to be affiliated.
6. The student committee should report its recommendations to the class and a vote should be taken of students. Usually, membership by all is required since the youth club will be a co-curricular activity.
7. After the students have selected an affiliation, they should elect a temporary chairman who will appoint a nominating committee. Reference should be made to the national organization's handbook for procedure to follow to affiliate at state and national levels.
8. The nominating committee will be responsible for providing candidates for president, vice-president, secretary, treasurer, historian, parliamentarian, chapter advisor, and other officers if necessary.
9. Election of officers should be held.

10. The President should appoint the committees determined necessary. Some suggested committees are:
    constitution,
    membership,
    financial or fund raising
    (treasurer should be chairman),
    program,
    social,
    public relations, and
    occupational development.

    Each member should be encouraged to serve on at least one committee, but no member should give a disproportionate amount of time by serving on too many committees.

11. Each committee should report to the membership and present its plan for the semester or year.

12. Membership dues should be determined and application for affiliation with the state association should be mailed to a designated state officer.

13. The coordinator should periodically review with officers and committee chairmen the plans and progress of the club.

14. Evaluation of the local student group program may be made periodically.

Phase XII - Checklist No. 2 - Form B

Form B - WHAT GOES INTO A CLUB'S BY-LAWS

A brief outline of a simple constitution might include the following divisions:

Article I - Name
Article II - Purposes
Article III - Membership
Article IV - Dues
Article V - Meetings
Article VI - Officers
Article VII - Committees
Article VIII - Rules of Order
Article IX - Amendments
By-Laws

Phase XII - Checklist No. 2 - Form C

Form C - BY-LAWS

1. Are officers elected by plurality vote? (whoever receives the most votes is elected)
2. Does the term of each officer extend until a successor is installed?
3. Is provision made for filling vacancies in the event that an officer dies, resigns, or becomes disabled prior to the regular end of his term?
4. Are a minimum number of meetings indicated, but meeting dates not specifically spelled out?
5. Is there provision for operational authority during the intervals between meetings?
6. Is provision made for calling a meeting by petition of a certain number of members if the officers fail to do so?
7. Is there provision for amending the constitution?
8. Is there provision for a quorum rule? If no rule is spelled out, a majority is a quorum.
9. Is there provision for notifying members of meeting dates in either the constitution or by-laws?
10. Is there provision for eligibility requirements and the process of admission for membership?
11. Is provision made for dropping a member from the rolls of the organization for nonpayment of dues or specific conduct?
12. Is the nominating committee required to nominate more than one candidate for each vacancy?
13. Is authority given in either the constitution or in the by-laws for some officer or group of officers to speak for the organization in emergencies?
14. Is there provision for a reference manual of parliamentary procedure as an authority on procedure or practice?
15. Have you referred to "By-Laws of Future Business Leaders of America" pp. 40-43, FBLA-PBL Handbook.

Phase XII - Checklist No. 2 - Form D

Form D - SUGGESTED CLUB ACTIVITIES

To insure student interest in a student organization, a well planned program and meaningful activities are essential. Following are suggestions which will provide types of activities which should interest most of the membership.

Fund Raising

1. Establish a typing-stenographic pool which would provide services for administration, supervisors, teachers, local business men and women, and fellow students for a nominal fee. All work should be carefully proofread by club members not assigned to a particular task. The club standard should underline the importance of only perfect work being returned to persons requesting service. If this activity is operated efficiently, beneficial public relations and monetary outcomes will accrue.
2. Candy sales.
3. Concession stands at sports events.
4. After game or special events dances.
5. Fashion shows.
6. Car wash.
7. Sponsor a box lunch social.
8. Sell various articles such as pens and pencils, school stationery, zip code books, rolls and milk in the mornings.
9. Bake sale.
10. Operate a school supply store.

Social

1. Plan exchange socials with other clubs.
2. For the fun part of meetings, students might do a variation of rhythm fun emphasizing shorthand brief forms or the parts of a typewriter.

3. Mock interviews with outstanding people in the business field.

4. Take down in shorthand the words to popular records.

5. Skating, hayride, bowling, swimming parties.

6. Make club float for homecoming parade.

7. Organize intramural teams.

Educational

1. Plan exchange meetings with other local chapters in the area. This will provide an opportunity to see what other schools are doing and give the students new ideas.

2. Conduct a follow-up study to determine how well the business department is meeting its objectives and obligations to students in the program.

3. Keep a file of up-to-date occupational information.

4. Aid in the selection of audio-visual aids to be used in the business department.

5. Keep a file of local people who are willing to be guest speakers, give demonstrations, etc. (List people with interesting avocations as well as vocations).

6. Establish a club speakers' bureau to furnish speakers for various school and civic activities.

7. Prepare an annual club yearbook. Include purposes of club, constitution and by-laws, names, addresses and telephone numbers of members and officers, program topic and program chairman for each meeting, special events, long-range projects, etc.

8. Conduct an occupational survey to determine types of equipment used in community, skills required of graduates, and job opportunities.

9. Arrange field trips for club members.

10. Keep a file on various occupations and their requirements.

11. Provide a tutoring service for those who are weak in a particular business subject.

Public Relations

1. Maintain bulletin board(s) or display case(s) in main corridor and illustrate the activities of the club.
2. Provide the service of arranging field trips to business firms for various classes and organizations in the school system. This will enable the students to communicate with local businesses and executives.
3. Set up placement service in school. This type of project may be to sophisticated for most clubs.
4. Sponsor awards in business education department on award day.
5. Hold open house on National Education Week and National Vocational Education Week.
6. Sponsor an issue of the school newspaper.
7. Participate in state and county fairs.
8. Present an all-school assembly program.

Community Services

1. Sponsor clean-up campaigns.
2. Sponsor health and welfare campaigns.
3. Participate in charitable drives such as Red Cross, March of Dimes, etc.
4. Contribute to civic imporvements such as park benches, fountains, trash barrels, etc.
5. Cooperate with business organizations in local events.
6. Sponsor an orphan or become active in a orphanage or veteran's hospital.

Phase XII - Checklist No. 2 - Form E

Form E - EVALUATE YOUR STUDENT ORGANIZATION

Instructions: Assess point values to each of the following questions. If you consider the club below average, rate (1), average (2), and excellent (3). Total the points for each category. Check the overall rating by the following scale.

Excellent	65 - 79 points
Average	41 - 64 points
Below Average	40 points and below

ACTIVE MEMBERSHIP

	Points 1	 2	 3
Are our members interested, active, cooperative and informed?	______	______	______
Are our advisors referred to for advice?	______	______	______
Does each member appear or assist with a chapter activity during the year?	______	______	______
Is a real effort made to find the abilities of each member?	______	______	______

ACTIVITIES

Are our activities based on club purposes?	______	______	______
Does our chapter program of work make use of the state and national program of work?	______	______	______
Is our program of work organized so that it is easily understood by all members?	______	______	______
Is our club part of the Office Education Program?	______	______	______
Is our chapter promoting training of students for the business world?	______	______	______

	Points		
	1	2	3
Have our activities helped our membership grow in the social graces?			
Are our money-making projects educational and related to the student organization goals?			
PUBLIC RELATIONS			
How have we interpreted our student organization to the community and school?			
Have we completed chapter activities which help strengthen the school in our community?			
DEMOCRATIC PRINCIPLES			
Have we promoted democracy and the development of creative leadership in school and community life?			
Are opportunities provided by the chapter for all members to learn to participate in group work?			
Are our chpater meetings orderly, well-planned meetings?			
Do the members clearly understand the student organization goals, objectives, and values?			
Do our members recognize the opportunity for personal growth through the student organization?			

Phase XII - Checklist No. 2 - Form E - Continued

LEARNING OPPORTUNITIES

	1	2	3
Is effective use made of the Chapter Handbook, activities guide, and current publications?			
Do Chapter experiences provide opportunities for all members to develop leadership abilities?			
Are accurate records kept on file?			
Are necessary reports and dues sent promptly to the State Advisor?			
Do we participate and assume our responsibilities in the State Organization?			
Did the projects of our chapter help us achieve the goals we set?			
Do we use what we learn from our evaluation for future plans?			

PHASE XII - STUDENT ORGANIZATIONS

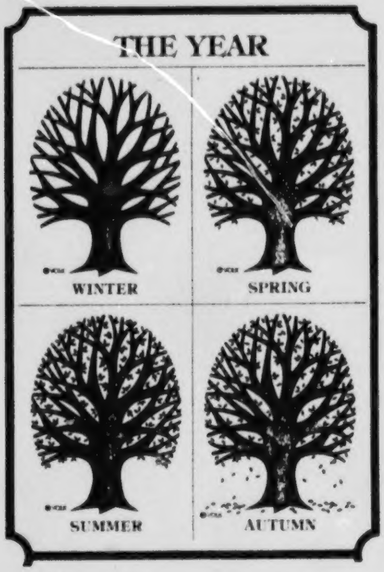
Checklist No. 3 - Development of a Yearly Student Club Calendar

Objective: to develop a yearly student club calendar.

Suggested Activities:

_____ 1. Prepare a long range plan of action. See Form A.

_____ 2. Prepare a tentative calendar of events holding two meetings a month, one business and one for speaker or activity. See Form B.



Forms:

A - Long Range Plan for Student Club

B - Illustration of Yearly Student Club Calendar

201

Phase XII - Checklist No. 3 - Form A

Form A - LONG RANGE PLAN FOR STUDENT CLUB

Blanktown High Schools Student Club

1. Check official Handbook.
2. Prepare a list of available speakers.
3. Prepare a list of available business for field trips.
4. Develop procedure for officer training workshops.
5. List tentative dates for State and National Leadership Conferences.
6. Plan for annual career days.
7. Plan employer-employee recognition banquet to be held in the spring.

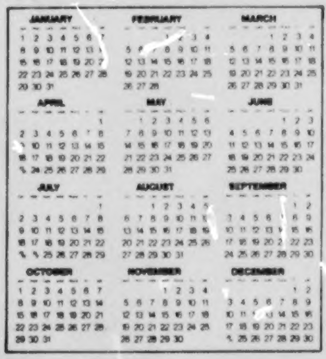
Phase XII - Checklist No. 3 - Form B

Form B - ILLUSTRATION OF YEARLY STUDENT CLUB CALENDAR

Following are suggested activities. Refer each year to the Annual Activities guide published by FBLA-PBL Inc.

SEPTEMBER	COMMENTS
If club is being organized, elect officers.	
On-going club have kick off meeting showing filmstrip of duties of officers and committee members.	
Activate committees, especially membership.	
Collect dues.	
Select fund raising projects.	
Appoint homecoming committee.	

OCTOBER	
Officially install officers if club is newly organized.	
Plan public relations activities.	
Parliamentary procedure demonstration.	
Appoint committee to organize a Christmas party.	
Appoint committee to prepare Thanksgiving food basket for a needy family.	



Phase XII - Checklist No. 3 - Form B - Continued

NOVEMBER	COMMENTS
Deliver Thanksgiving food basket.	
Plan field trip (check list prepared for long range plan).	

DECEMBER	
Plan Christmas social service project.	
Plan club social event.	

JANUARY	
Plan exchange meeting with other chapters in community.	
Plan skating party.	

FEBRUARY	
Sponsor a Valentine fashion show for fund raising.	
Begin working on state convention competition.	
Schedule speaker.	

Phase XII - Checklist No. 3 - Form B - Continued

MARCH

COMMENTS

Make plans for employer-employee recognition banquet. Set date for late April or early May.

Sponsor school dance or bake sale.

APRIL

Organize clean up campaign for local park, etc.

Attend State Convention.

Appoint or activate nominating committee.

MAY

Elect officers for coming year.

Install officers at last meeting.

JUNE

Attend National Convention or Leadership Conference.

PHASE XIII

EVALUATION

PAGE

1. Evaluation of Student on the Job 173
   - A. Purpose of Student-Learner Evaluation 174
   - B. Suggested Criteria for Student-Learner Evaluation 174
   - C. Student-Learner Self-Evaluation Form 175
   - D_1 Job Rating Sheet 176
   - D_2 Job Rating Sheet 177
   - E. Student-Learner Record 178

2. Evaluation of the Student in the Related Class 180
   - A. Teacher Rating Record of Course Competency 181

3. Evaluation of the Training Firm 182
   - A. Purposes and Methods of Evaluating Training Firms ... 183
   - B. Criteria for Evaluating Training Firms 184

4. Evaluation of the Cooperative Program 185
   - A. Checklist for Evaluating Cooperative Programs in Office Education 186

5. Coordinator's Self-Evaluation 189
   - A. Purposes and Process of Self-Evaluation 190
   - B. Criteria in Self-Evaluation of Office Education Coordinator 192
   - C. Tasks of Office Education Coordinator 193
   - D. Student Evaluation of Coordinator 194

PHASE XIII - EVALUATION

Checklist No. 1 - Evaluation of Student on the Job

Objective: To evaluate the student's job performance in relation to grading and progress toward career objective.

Suggested Activities:

_____ 1. Determine purposes of evaluating student learner. See Form A.

_____ 2. Determine criteria to be considered in on-the-job performance. See Form B.

_____ 3. Develop a self-evaluation sheet for student learner. See Form C. Use three to four times a semester or training period.

_____ 4. Ask supervisor to evaluate student using Form D-1 or D-2, Job Rating Sheet.

_____ 5. Analyze evaluation of employer, coordinator, and student learner with student.

_____ 6. Maintain a student-learner record file as a central source of information concerning student. See Form E.

Forms:

A - Purpose of Student-Learner Evaluation

B - Suggested Criteria for Student-Learner Evaluation

C - Student-Learner Self-Evaluation Form

D_1- Job Rating Sheet

D_2- Job Rating Sheet*

E - Student-Learner Record

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*Dept. of Education, A Competency-Based Guide for Organizing and Administering Cooperative Office Education, Richmond, VA (June, 1979) p. 9.14

Phase XIII - Checklist No. 1 - Form A

Form A - PURPOSE OF STUDENT-LEARNER EVALUATION

Systematic evaluation of the student-learner is undertaken to help the student to attain career objectives and to assess progress toward those objectives. The evaluation should determine student learning and competency in terms of business objectives and business judgment.

The evaluation should be based on realistic production standards. It should also be concerned with human relation factors which are consistent with the objectives of the program and the requirements of the job. When observing human relations, the coordinator must often be subjective and use personaljudgment in the rating that is given the student.

Phase XIII - Checklist No. 1 - Form B

Form B - SUGGESTED CRITERIA FOR STUDENT-LEARNER EVALUATION

Studies have been carried out which determine how business and industry rate their employees. The results of this research has shown that the following criteria are used in developing evaluation instruments.

1. Does the student work well with others?
2. Does the student acquire skills quickly and show improvement in carrying out duties outlined in the training plan?
3. Does the student adjust to the job and respond to supervision?
4. Does the student show development of attitudes, self-confidence, and maturity?
5. Does the student use good judgment in making decisions?
6. Does the student handle critical incidents well?
7. Does the student show initiative in keeping busy?
8. Does the student demonstrate ability to solve day to day problems of a going business?
9. Does the student meet expectations of employer?
10. Does the student realize his own expectations?
11. Is the student loyal?
12. Is the student dressed appropriately?

Phase XIII - Checklist No. 1 - Form C

Form C - STUDENT-LEARNER SELF-EVALUATION FORM

STUDENT'S SELF-EVALUATION FORM

Name ______________________ Employer ______________________

Type of Job __________________ Bus. Phone ____________________

Average Hours Worked Each Week ___ Supervisor ____________________

	Excellent	Satisfactory	Need Improvement	Not Applicable
1. Ability to follow instructions.				
2. Ability to get along with others.				
3. Dependability.				
4. Industry and initiative.				
5. Loyalty to company.				
6. Enthusiasm toward work.				
7. Honesty.				
8. Punctuality.				
9. Mental alertness.				
10. Courtesy and manners.				
11. Personal appearance.				
12. Proofreading and erasures.				
13. Appearance of work.				
14. Quantity of work produced.				
15. Quality of work produced.				

I have the following overall criticism of my work: ______________

____

____

Improvements needed: ________________________________

____

____

Would I feel justified in anticipating a raise in salary if my work were consistently of this caliber? ______________________

Grade I feel I deserve: __________ Date ______________________

Phase XIII - Checklist No. 1 - Form D-1

Form D-1 - JOB RATING SHEET

COOPERATIVE OFFICE EDUCATION WORK EXPERIENCE
JOB RATING SHEET

CONFIDENTIAL:

Student-Learner's Name ______________________________ Date ____________________

Employer ____

EMPLOYER'S EVALUATION OF WORK EXPERIENCE OF STUDENTS ON THE JOB:
Your constructive criticism enables us to provide better instructional training. Please check the following traits as (4) excellent, (3) good, (2) poor, (1) unsatisfactory, omitting any that do not apply to the student-learner in your office.

PERSONAL TRAITS:		SKILL PERFORMANCE:	
Grooming	4 3 2 1	Typing	4 3 2 1
Suitability of dress	4 3 2 1	Shorthand	4 3 2 1
Personal hygiene	4 3 2 1	Filing	4 3 2 1
Speech	4 3 2 1	Grammar	4 3 2 1
Interest in work	4 3 2 1	Spelling	4 3 2 1
Cooperation	4 3 2 1	Punctuation & capitalization	4 3 2 1
Initiative	4 3 2 1	Proofreading	4 3 2 1
Adaptability	4 3 2 1	Neatness	4 3 2 1
Tact	4 3 2 1	Recordkeeping	4 3 2 1
Punctuality	4 3 2 1	Office machines	4 3 2 1

ABILITY TO:		BUSINESS TECHNIQUES:	
Follow instructions	4 3 2 1	Use of telephone	4 3 2 1
Take criticism	4 3 2 1	Use of sources of information	4 3 2 1
Attend to details	4 3 2 1	Office housekeeping	4 3 2 1
Keep on the job	4 3 2 1	Meeting people	4 3 2 1

GENERAL COMMENTS: ____

____

____

GENERAL RATING OF STUDENTS: Excellent ☐ Good ☐ Fair ☐ Unsatisfactory ☐

Please list any points that should be emphasized in training:

Rated by ______________________________

Phase XIII - Checklist No. 1 - Form D-2

Form D-2 - JOB RATING SHEET*

COOPERATIVE OFFICE EDUCATION
EMPLOYER EVALUATION REPORT

FIRM ______________________ DATE ______________________
SCHOOL ______________________ STUDENT ______________________
TRAINING SPONSOR ______________________

Your evaluation of the student-learner enables us to provide better instructional training. Your rating is used in determining the student's nine-week grade. Please circle the following traits as: 0-unsatisfactory; 1-fair; 2-good; 3-excellent. (If not applicable, circle NA)

Personal Traits

Grooming	0	1	2	3
Suitability of dress	0	1	2	3
Personal hygiene	0	1	2	3
Personality	0	1	2	3
Speech	0	1	2	3
Interest in work	0	1	2	3
Cooperation	0	1	2	3
Initiative	0	1	2	3
Adaptability-flexibility	0	1	2	3
Reliability	0	1	2	3
Tact	0	1	2	3
Dependability	0	1	2	3

Ability to:

Follow directions	0	1	2	3
Understand instructions	0	1	2	3
Take criticism	0	1	2	3
Attend to details	0	1	2	3
Keep at the job	0	1	2	3
Get along with others	0	1	2	3
Use good judgment	0	1	2	3

Skill Performance

Computer programming	0	1	2	3	NA
Typewriting	0	1	2	3	NA
Shorthand	0	1	2	3	NA
Filing	0	1	2	3	NA
English usage	0	1	2	3	NA
Spelling	0	1	2	3	NA
Punctuation and capitalization	0	1	2	3	NA
Proofreading	0	1	2	3	NA
Office machines:					
Calculating	0	1	2	3	NA
Duplicating	0	1	2	3	NA
Transcribing	0	1	2	3	NA
Word Processor	0	1	2	3	NA
Recordkeeping	0	1	2	3	NA
Penmanship	0	1	2	3	NA

Business Techniques

Use of telephone	0	1	2	3
Use of supplies	0	1	2	3
Meeting people	0	1	2	3
Office housekeeping	0	1	2	3
Knowledge of job	0	1	2	3

Times absent this evaluation period ____________ Times late ____________

Overall rating of student-learner. Please circle one:

3 Excellent 2 Good 1 Fair 0 Unsatisfactory

Comments that would assist the coordinator in student training: ____________
____

Has this report been discussed with the student-learner? _____ Yes _____ No

______________________ Signature of Rating Official ______________________ Title

______________________ Student's Signature ______________________ Date

Phase XIII - Checklist No. 1 - Form E

Form E - STUDENT-LEARNER RECORD

Introduction:

A complete record of personal and educational information about the student-learner must be obtained by the coordinator. The following information has been gathered and placed in the student's file. Check when completed.

The record should include:

_____ 1. Personal information - name, date of birth, place of birth (city and state), sex, home address, telephone, parent's name and occupation, names and ages of brothers and sisters, and educational background of parents.

_____ 2. Educational background - schools attended, courses taken in high school and grades earned.

_____ 3. Test results - I.Q. test, achievement tests, and vocational tests.

_____ 4. Extra-curricular activities - clubs of which the student is a member, offices held in various organizations, honors, special awards, community activities, and church affiliation.

_____ 5. Career objective - there should be a written copy of the student's career objective.

_____ 6. Work experience - a record of any previous work experience including names of firms, dates of employment, salary received, duties performed on the job, and reason for termination of employment.

_____ 7. A copy of the student's application for the OE program.

_____ 8. A copy of the coordinator's interview report.

_____ 9. A copy of the training agreement.

_____ 10. A copy of the step-by-step training plan.

_____ 11. A copy of the student interest survey form.

_____ 12. Letters of recommendation (if required) - no more than one of these should be from a faculty member.

_____ 13. Work permit.

_____ 14. Student reports of their individual study, reading, and projects.

_____ 15. Evaluation reports completed by the employer.

_____ 16. Weekly work reports completed by the student - including problems encountered by the student-learner on the job.

_____ 17. Reports of the coordinator on visitations to the student's home and training station.

_____ 18. Reports of the coordinator on conferences with teachers, the student, counselor, parents, and employer.

_____ 19. An evaluation report by the student-learner relating to the on-the-job training.

_____ 20. A copy of the student's self-appraisal sheet.

Checklist No. 2 - Evaluation of the Student in the Related Class

Objective: To evaluate student performance in the related class.

Suggested Activities:

_____ 1. Evaluate students' progress through testing according to established course standards.

_____ 2. Evaluate students' abilities in carrying out individualized units by tests and samples of students' work.

_____ 3. Evaluate the ability of students to apply that which is learned in class to on-the-job performance.

_____ 4. Review step-by-step training plan to determine if a concentrated evaluation has been made in each area of related class content. For an example see Appendix A.

_____ 5. Rate each student in the office education related class utilizing Form A.

Forms:

A - Teacher Rating Record of Course Competency

Phase XIII - Checklist No. 2 - Form A

Form A - TEACHER RATING RECORD OF COURSE COMPETENCY

TEACHER RATING RECORD OF COURSE COMPETENCY

Name ______________________________ Semester ______________________________

1. *Areas of Class Work:* Achievement

	1st 9-wks.	2nd 9-wks.	Final Test	Semester Grade
a. Typing				
b. Office Practice Projects				
c. Office Machines				
d. Filing				
e. Secretarial Training				
f. Accounting				
g. Spelling				
h. Computation Skills				
i. Proofreading				
j. Production Ability				
k. Data Processing				

2. *Attitude and Traits:* Evaluation

a. Neatness in Work				
b. Work Habits				
c. Attendance & Tardiness				
d. Personal Appearance				
e. Ability to Follow Instructions				
f. Dependability				
g. Cooperation With Superiors				
h. Ability to Work With Others				

SEMESTER AVERAGE: ________

RATING SCALE:

4 - A or Superior

3 - B or Above Average

2 - C or Average

1 - D or Below Average

0 - F Poor or Failure

PHASE XIII - EVALUATION

Checklist No. 3 - Evaluation of the Training Firm

Objective: To establish procedures to evaluate training firms according to predetermined criteria.

Suggested Activities:

_____ 1. Refer to Form A, which deals with purposes and methods of evaluation.

_____ 2. Determine objectives of the evaluation process.

_____ 3. Read Form B, which contains criteria for evaluating a training firm.

_____ 4. Utilize Form B in evaluating training firm.

_____ 5. Analyze carefully data from evaluation form.

_____ 6. Follow-up on evaluation of firms by communicating results of the evaluation.

Innovative Activities:

_____ 1. Attempt to establish rapport with training firms in order to go over evaluation reports.

Forms:

A - Purposes and Methods of Evaluating Training Firms

B - Criteria for Evaluating Training Firms

Phase XIII - Checklist No. 3 - Form A

Form A - PURPOSES AND METHODS OF EVALUATING TRAINING FIRMS

Introduction:

Evaluation is an important process in the operation and administration of the cooperative office education program It should be a continuous and on-going process, covering all aspects of the program. To insure the most effective evaluation of the training firm, the following approach is suggested:

Principles of Evaluation:

The following principles are listed as being important in the evaluation process:

1. The evaluative process is part of the operation of an effective program.
2. Program evaluation should be a part of the evaluation.
3. Self-appraisal should be a part of the evaluation program.
4. Evaluation of the program would be made in terms of the school philosophy and program goals.
5. A variety of measurement techniques should be used to secure needed data.
6. Evaluation data should serve as a basis for planning immediate changes and developing long-range plans.
7. People react more favorably to evaluation if they know the purpose of the evaluation.
8. Self-evaluation can be more effective than evaluation of an outside source.

Determining Purposes of Evaluating Training Firms:

The main purposes of evaluating training is improvement of the program. Other purposes are for self-motivation, to determine if objectives are being met, and to determine what plans should be revised.

Methods of Evaluation: The evaluation process would include the following:

1. To clarify program goals
2. To describe specific outcomes
3. To secure necessary data
4. To analyze and interpret data
5. To assist in planning immediate and long-range plans
6. To effect necessary changes

Phase XIII - Checklist No. 3 - Form B

Form B - CRITERIA FOR EVALUATING TRAINING FIRMS

Name of Cooperating Firm ________________________________
Name of Supervisor ________________________________
Total Number of Student-Learners Participating ________________
Number of Years the School Has Operated ________________

Instructions for use of the checklist:

This checklist of criteria for rating a cooperative training firm consists of statements of provisions, conditions, or characteristics that are found in quality programs in secondary schools. If any important features or procedures are omitted, they should be added in the appropriate sections.

Rate each item using your best judgment and all available evidence. The suggested key for rating each statement is:

4 - Excellent: The condition is extensive and is functioning very well.

3 - Satisfactory: The condition is moderately successful and is functioning.

2 - Needs Improvement: The condition is limited in extent and is functioning poorly; or it is entirely missing but needed.

1 - Does not apply: The provisions are missing or do not apply. They may also be undesirable for the students of the program, or not conform to the school's objectives.

____ The cooperative training firm provides a training station throughout the entire school year.
____ The training firm is willing to pay the minimum wage or at a rate commensurate to ability and training of other employees with similar responsibility.
____ Students are rotated and given a variety of learning activities.
____ The training firm has a cooperative and interested attitude in working for the school and the student.
____ The training firm is interested in improving their role in meeting the training objective.
____ Training supervisors are appointed by employers for each student.
____ The training firm should provide experience in occupations that require both skills and knowledges.
____ The working conditions of training stations should be safe and free of hazards that might impair the safety or health of the worker.
____ Business firms which furnish training stations should practice ethical business practices.
____ A sufficient number of working hours is available at the training station to provide job skills.
____ The training sponsor is conscientious in following the training plan.
____ The training firm is cooperative in evaluation of student-learner.

Checklist No. 4 - Evaluation of the Cooperative Program

Objective: To determine the strengths and weaknesses of the program and to devise possible alternatives for improvement.

Suggested Activities:

_____ 1. Evaluate informally during the operation of the program throughout the year.

_____ 2. Evaluate formally at the end of each school year:

a. to determine the extent to which students have profited by the training they have received.

b. to determine how the program can be improved.

c. to determine if the program measures up to its community potential.

d. to determine whether businessmen are accepting the program through continued participation.

A suggested checklist and rating scale is illustrated in Form A.

_____ 3. Analyze carefully the results of the evaluation and compare with results of follow-up study. In this way, the coordinator can devise ways to strengthen the program and to insure adequate accountability.

_____ 4. Present findings to the principal and/or superintendent.

Forms:

A - Checklist For Evaluating Cooperative Programs in Office Education

Phase XIII - Checklist No. 4 - Form A

Form A - CHECKLIST FOR EVALUATING COOPERATIVE PROGRAMS IN OFFICE EDUCATION

CHECKLIST FOR EVALUATING COOPERATIVE PROGRAMS

YES NO **OBJECTIVES:**

_____ _____ 1. Has a written statement setting forth the philosophy and objectives of the cooperative office skills program been developed?

_____ _____ 2. Is the program evaluated periodically in terms of these objectives?

ADVISORY COMMITTEE:

_____ _____ 1. Has a general advisory committee made up of local business representatives been appointed to assist the school in the development of the whole business education program?

_____ _____ 2. Have the services of this committee or a special advisory committee been utilized in the formulation of the philosophy and objectives of the cooperative office skills program?

_____ _____ 3. Is this committee called upon to assist the coordinator in locating suitable training stations for the program?

_____ _____ 4. Does this committee meet regularly and function actively?

COMMUNITY, SCHOOL UNDERSTANDING:

_____ _____ 1. Has the program been given adequate publicity and promotion among various community organizations?

_____ _____ 2. Have the objectives and philosophy of the program been presented clearly to the entire faculty.

_____ _____ 3. Are guidance counselors informed as to the place of work experience in the total school program?

_____ _____ 4. Does the coordinator discuss the program and its operation in pre-vocational business classes in order that long-range plans may be made by the students?

_____ _____ 5. Does the coordinator counsel with other business teachers in the school regarding prospective cooperative students?

_____ _____ 6. Are written objectives and operating procedures of the program placed before parents of potential cooperative students?

_____ _____ 7. Are students counseled regarding entering the cooperative office education program on the basis of their abilities and interests?

WORK STATIONS:

_____ _____ 1. Do the work stations provide an opportunity for well-organized learning situations?

Phase XIII - Checklist No. 4 - Form A - Continued

YES	NO	WORK STATIONS:
_____	_____	2. Do the learning opportunities provide varied tasks?
_____	_____	3. Is an effort made to rotate students on those jobs where varied learnings are not possible?
_____	_____	4. Does the schedule of the coordinator provide sufficient time to visit these training stations periodically?
_____	_____	5. Does the coordinator observe the students while on the job?
		RELATED INSTRUCTION:
_____	_____	1. Are students encouraged to participate in the evaluation of the instruction and thereby contribute to the progress of the program?
_____	_____	2. Is an effort made in the periods of related instruction to present basic background information, skills, and attitudes that are common to all office occupations?
_____	_____	3. Does the coordinator endeavor to provide instructions for each student directly related to his specific job situation?
_____	_____	4. Are the standards of achievement demanded in the classroom comparable to those of beginning office workers?
_____	_____	5. Does the teacher-coordinator have suitable classroom instructional materials?
_____	_____	6. Does the classroom laboratory have adequate machine equipment?
_____	_____	7. Does the school budget permit periodic addition or replacement of equipment?
		REPORTS:
_____	_____	1. Does the coordinator work with the guidance staff in his efforts to secure information about students?
_____	_____	2. Does the coordinator have access to, and use, complete student records including tests, grades, attendance, and health records, and other available data?
_____	_____	3. Have suitable forms been prepared for recording each of the various coordinating activities?
_____	_____	4. Does the coordinator prepare a record of the daily coordination activities?
_____	_____	5. Is this report presented weekly or monthly to the school principal and superintendent?
_____	_____	6. Is the coordinator able to maintain some type of weekly record for each student which is in sufficient detail that it can be used for individual conferences with the student?
_____	_____	7. Is the student accomplishment on the job evaluated periodically by the employer?
_____	_____	8. Has the coordinator prepared an evaluative device to be used by employers in their appraisal of students under their jurisdiction?
_____	_____	9. Are these employer reports used as a basis for classroom instruction and conferences?

Phase XIII - Checklist No. 4 - Form A - Continued

YES ____ NO ____

____ ____ 10. Is an accomplishment report submitted at least quarterly to the school administration for review?

FOLLOW-UP ACTIVITIES:

____ ____ 1. Does the coordinator have an organized program of follow-up of former cooperative students?
____ ____ 2. Are records of these former students kept up to date?
____ ____ 3. Are former cooperative students encouraged to counsel with the coordinator?
____ ____ 4. Is the cooperative program adjusted to the findings of the follow-up program?
____ ____ 5. Are these findings recorded and reported to the school administrator, the faculty, and the advisory committee?

PUBLIC RELATIONS:

____ ____ 1. Is the cooperative program periodically publicized in school publicity media?
____ ____ 2. Is a planned program of publicity carried on within the school for the benefit of the members of the faculty?
____ ____ 3. Is the cooperative program periodically publicized in local publicity media?
____ ____ 4. Does the school administrator check the effectiveness of the program with each of the following:
  ____ Business Representatives?
  ____ Faculty Members?
  ____ Community Groups?
  ____ Pupils?
____ ____ 5. Does the school administrator occasionally accompany the coordinator on visits?

LEGAL REQUIREMENTS:

____ ____ 1. Are all students participating in the actual work experience phase 16 years of age or over?
____ ____ 2. Are students employed an average of ten hours a week during the school year?
____ ____ 3. Is the program under supervision by the coordinator at all times when the hours reported above are counted?
____ ____ 4. Are students being paid for their work?

Checklist No. 5 - Coordinator's Self-Evaluation

Objective: To perform self-evaluation by the coordinator for the purpose of improvement.

Suggested Activities:

_____ 1. Read Form A, which outlines purposes and processess of self-evaluation.

_____ 2. Utilize Form B, which is a self-evaluation form or Form C, which outlines the tasks of the coordinator.

_____ 3. Have students complete a teacher evaluation form at the end of each grading period for locating deficiencies and providing possibilities for improvement of instruction. For an example, see Form D.

_____ 4. Carefully evaluate the results of the evaluation.

_____ 5. Consider what areas to make improvements in for the next year.

Innovative Activities:

_____ 1. Have one of the members of the administration fill out an evaluation form for you.

Forms:

A - Purposes and Process of Self-Evaluation

B - Criteria in Self-Evaluation of Office Education Coordinator

C - Tasks of Office Education Coordinator

D - Student Evaluation of Coordinator

Phase XIII - Checklist No. 5 - Form A

Form A - PURPOSES AND PROCESS OF SELF-EVALUATION

Introduction:

As an integral part of evaluating the vocational office education program, the coordinator should consider how his/her performance may be evaluated. The coordinator as a professional should be interested in self-improvement. The coordinator should strive to better herself/himself by introspectively examining his/her progress and performance. No person likes to determine for themself their weaknesses, although one may intuitively know them. The sole objective of self-evaluation must be improvement or it will only be mechanical in nature.

Process of Self-Evaluation:

The process of self-evaluation will be similar to the evaluation process of the student, the training station, or any other phase of the office education program. The following items must be considered:

1. Determining the objectives of the evaluation.
2. Establishing of evaluative criteria.
3. Conducting the evaluation
4. Summarizing the results
5. Determining plans for future improvement

The office coordinator can obtain data regarding evaluative criteria from various sources such as those recommended in this checklist. The coordinator can obtaindata regarding his/her performance by one of the following methods:

1. Use of self-evaluation checklists
2. Use of student evaluation reports
3. Use of evaluation reports by superior

Method one or two above are used most frequently by office coordinators. It is suggested that prior to using student evaluation or self-evaluation forms, the following two sections be read:

Self-Evaluation Checklists--provided in this checklist are several self-evaluation forms. They are to be used with discretion and as a guide to what is a good performance. In the daily routine, the coordinator can easily forget some of the tasks or responsibilities. A self-evaluation should be considered in such light. The checklists should be revised as desired.

Student Evaluation--certain considerations are evident when using student evaluations. They are as follows:

1. Students might use the opportunity not to evaluate the coordinator seriously.
2. The evaluation may be biased by the student's opinion of the coordinator's personality.
3. The student is a novice and may not be competent to evaluate the coordinator's performance.
4. Students can only evaluate efforts of the coordinator which are self evident to them.

One way in which the coordinator may reduce the deterrent in No. 1 is to correctly orient the student to the evaluation. The coordinator should explain the evaluation is for the purpose of self-improvement, much like an evaluation completed for them. There is not much the coordinator can do about items 2, 3, and 4. Unless the coordinator is willing to use such evaluation forms, he/she will not gain any confidence in using them for the purposes intended.

Phase XIII - Checklist No. 5 - Form B

Form B - CRITERIA IN SELF-EVALUATION OF OFFICE EDUCATION COORDINATOR

Instructions for use of the checklist: Rate each item using your knowledge and the available information. The suggested key for rating each statement is as follows:

0 - DOES NOT APPLY	2 - SATISFACTORY
1 - EXCELLENT	3 - NEEDS IMPROVEMENT

_____ The teacher/coordinator meets the North Dakota State Plan for Vocational Education credential requirements.

_____ The teacher/coordinator maintains membership in at least one local civic organization such as the Chamber of Commerce or a luncheon club.

_____ The teacher/coordinator takes an active part in school and community affairs.

_____ The teacher/coordinator participates in conferences, workshops, in-service programs, professional organizations, and other activities contributing to professional growth.

_____ The teacher/coordinator makes a constant effort to improve business and professional relationships.

_____ The teacher/coordinator serves as advisor to the FBLA-PBL program.

_____ The teacher/coordinator plans and carries out research resulting in the constant improvement of the program.

_____ The teacher/coordinator is respected by the students and faculty.

_____ The teacher/coordinator contacts employers and sets up training stations for all students in the class.

_____ The teacher/coordinator checks conditions under which the student works to see that they are in accordance with state child labor laws.

_____ The teacher/coordinator is allowed sufficient time for coordination activities.

_____ The teacher/coordinator plans the coordination time and devleops a schedule which is followed to a reasonable extent.

_____ The teacher/coordinator publicizes the program.

_____ The teacher/coordinator makes an effort to keep the school and community informed of the progress of the program.

_____ The teacher/coordinator organizes & teaches the related class in office education.

_____ The teacher/coordinator either teaches or helps plan other courses which are related to the student needs.

_____ The teacher/coordinator periodically evaluates the classroom instruction.

Phase XIII - Checklist No. 5 - Form C

Form C - TASKS OF THE OFFICE EDUCATION COORDINATOR

Instructions: This form is a checklist for the coordinator in evaluating the various tasks of the job. Use the following scale in using the checklist:

4 - EXCELLENT	2 - NEEDS IMPROVEMENT
3 - SATISFACTORY	1 - DOES NOT APPLY

GUIDANCE AND SELECTION OF STUDENTS

_____ Describing the program to students
_____ Working with guidance personnel
_____ Providing occupational information
_____ Counseling students about entering the program
_____ Gathering information on students
_____ Programming and scheduling
_____ Helping enrollees with career planning

PLACING STUDENTS IN TRAINING JOBS

_____ Enlisting participation of cooperating employers
_____ Selecting suitable training stations for each student
_____ Orienting employers, training supervisor and co-workers
_____ Preparing students for job interviews
_____ Placing students on the job

ASSISTING STUDENTS IN ADJUSTING TO THEIR WORK ENVIRONMENT

_____ Helping student on their jobs
_____ Dealing with job problems
_____ Planning personal development with training supervisors and students
_____ Evaluating job progress

IMPROVING TRAINING DONE ON THE JOB

_____ Establishing responsibilities on the job
_____ Developing training plans
_____ Consulting and assisting training supervisors
_____ Maintaining training emphasis

CORRELATING CLASSROOM INSTRUCTION WITH ON-THE-JOB TRAINING

_____ Determining needed instruction
_____ Assembling instructional materials
_____ Preparing for instruction
_____ Teaching classes
_____ Directing individual projects and study
_____ Obtaining assistance from other teachers
_____ Advising training supervisor concerning applications of classroom instruction to be made on the job
_____ Evaluating learning outcomes

Phase XIII - Checklist No. 5 - Form C - Continued

ASSISTING STUDENTS IN MAKING PERSONAL ADJUSTMENTS

_____ Aiding students in correcting poor personal habits
_____ Counseling students with personal and socio-economic problems
_____ Assisting students with educational problems
_____ Resolving behavioral problems

DIRECTING VOCATIONAL STUDENT ORGANIZATION

_____ Advising student group
_____ Guiding students in organization of activities
_____ Participating in group activities

PROVIDING SERVICES TO GRADUATES AND ADULTS

_____ Providing guidance and placement services for graduates
_____ Participating in the planning and operation of adult education programs

ADMINISTRATION ACTIVITIES

_____ Planning program objectives
_____ Research and planning - surveys
_____ Organizing and working with advisory committee
_____ Planning curriculums
_____ Communicating school policy
_____ Preparing reports
_____ Budgeting and purchasing
_____ Participating in professional meetings
_____ Consulting with manpower agencies such as employment services and CAMPS

MAINTAINING GOOD PUBLIC RELATIONS

_____ Planning the publicity program
_____ Preparing printed publicity
_____ Constructing displays and exhibits
_____ Contacting news media
_____ Maintaining communication with faculty, parents, community, employers, school administrators, and student body

Phase XIII - Checklist No. 5 - Form D

Form D - STUDENT EVALUATION OF COORDINATOR

STUDENT EVALUATION OF COORDINATOR

Directions: This evaluation form has been arranged in such a manner that you can answer all questions without revealing your name through your handwriting. If you answer each item frankly and honestly, the results will give your instructor information on how you feel about the course and the procedures used. Indicate your evaluation by rating each item with: A-superior, B-good, C-average, D-below average, and F-poor. Do not write your name on this form!

A. Manner of presentation:
  Ability to speak distinctly and in an engaging voice ________
  Poise in the classroom ________
  Use of the blackboard ________
  Self-confidence ________
  Ability to get student cooperation and attention readily ________

B. Relationships with students:
  Ability to make students feel secure and at ease ________
  Genuine interest in students ________
  Friendliness, (Conversational--sense of humor) ________
  Provision for your individual differences ________
  Fairness in grading and fairness in dealing with students ________

C. Personal characteristics:
  Personal appearance ________
  Exercise of good judgment and tact ________
  Emotional stability and maturity, not easily upset ________
  Interest and enthusiasm about teaching and about subject matter ________

D. Classroom management:
  Resourcefulness-ability to meet unexpected situations ________
  Ability to plan and organize activities efficiently ________
  Command of student respect without force ________

E. Knowledge of subject matter and professional skills:
  Knowledge of subject matter being taught ________
  Ability to make classroom work interesting ________
  Preparation of tests and examinations ________
  Fairness in assigning classroom work ________
  Fairness in assigning marks ________
  Adequacy of grading system ________

F. Overall teaching ability: ________

G. What weaknesses do you find in the course as it is set up and what do you suggest for eliminating these weaknesses? ____________________
____
____
____

This form is to be utilized at the end of each grading period.

PHASE XIV

JOB PLACEMENT OF COMPLETER-LEAVER

PAGE

1. The Role of the Teacher Coordinator in Placement Activities 195
   - A. The Role of the Office Education Coordinator in Assisting the School Administration and Guidance Counselor in Placement Activities 196
   - B. Specific Activities for the Teacher Coordinator in Job Placement 198
   - C. Personal Record Card 199
2. Utilization of Services Offered by the North Dakota Job Service 200
   - A. List of Job Service Offices in North Dakota 201

XIV - JOB PLACEMENT OF COMPLETER-LEAVER

Checklist No. 1 - The Role of the Teacher Coordinator in Placement Activities

Objective: To understand the role of the teacher coordinator in the placement of completer-leaver.

Suggested Activities:

_____ 1. Study Form A, which concerns the role of the office education coordinator in placement of completer-leaver.

_____ 2. Meet with guidance counselor and discuss possible procedures to follow in placement of completer-leaver. See Form B.

_____ 3. Review evaluative criteria on performances of student-learner. Bring files up to date if necessary. Use Form C, if adaptable.

_____ 4. Establish card file on possible job openings. This can be accomplished by a letter or a visitation to determine what the employment situation is in their firm.

_____ 5. Follow through on proposed plan for job placement of completer-leaver.

Forms:

A - The Role of the Office Education Coordinator in Assisting the School Administration and Guidance Counselor in Placement Activities

B - Specific Activities for the Teacher Coordinator in Job Placement

C - Personal Record Card

Phase XIV - Checklist No. 1 - Form A

Form A - THE ROLE OF THE OFFICE EDUCATION COORDINATOR IN ASSISTING THE SCHOOL ADMINISTRATION AND GUIDANCE COUNSELOR IN FULFILLING PLACEMENT ACTIVITIES

Introduction:

Job placement of graduates is one of the activities which deserves the attention of school personnel. In its broadest sense, placement can mean the transfer of a student from a secondary school environment to another educational or job environment for the purpose of attaining his career objective. This concept implies that placement involves all students who will either (1) enter the job market, (2) obtain apprenticeship type training, or (3) secure further training at an educational type institution. The goal, therefore, of all comprehensive secondary schools should be 100 per cent placement of its completer-leavers.

Although the school does not act as a placement bureau, it can assist in the placement function. School personnel including teachers, guidance counselors, and administrators know more about students than any other agency or group. A brief summary of the role of the office education coordinator in the placement process is presented below.

Role of the Office Education Coordinator:

The office education coordinator should be an integral part of the placement process. He possesses detailed information about office education students which is important in the placement of these students. This information would include the following:

1. academic record in office education courses as well as other courses
2. student self-appraisal
3. knowledge of career objectives
4. evaluation of work performance
5. information on co-curricular participation

Because of the position and the information that the coordinator possesses about each student, the coordinator can offer vital assistance in the placement process. The coordinator can:

1. assist the job service agency
2. be informed of local employment trends and statistics
3. keep all files of students up to date

4. record information about job openings

5. assist the principal and/or superintendent in answering requests for information about students

Assisting School Administration:

The office education coordinator should work closely with the school superintendent, principal, and guidance counselor if they are involved in the placement process. The school principal may be responsible for assisting directly or indirectly all students upon graduation in job placement or post-secondary entry. The principal and sometimes the superintendent's office has the responsibility for collecting and recording data concerning the student. Data for each graduate could include a transcript of all grades, extra and co-curricular activities, test scores, awards, etc. Requests for information could concern the following:

1. possible candidates for job employment

2. a student's scholastic record upon request of an employer

3. copies of transcripts and other information to other educational institutions

4. recommendations concerning personal qualifications of the student

The school administration in the smaller schools are more apt to be involved in job placement than those in larger schools, because they constitute the only source of information available regarding completer-leavers. The office education coordinator can assist the school administration by providing information about office education students and suggest students for specific jobs.

Assisting the Guidance Counselor:

1. collection of data about the student's personal traits through conferences and other contacts with the student

2. collection and dissemination of information about careers and occupations

3. collection of data about employment trends and statistics

The guidance counselor can have a definite influence on the student's development of career objectives. Contacts with students are often directly related to their future plans. If, however, no guidance counselor is available, a greater responsibility will fall on the office education coordinator to fulfill this function.

Phase XIV - Checklist No. 1 - Form B

Form B - SPECIFIC ACTIVITIES FOR THE TEACHER COORDINATOR IN JOB PLACEMENT

Although the guidance counselor will have direct responsibilities in job placement, the office coordinator can do much to assist in this function. The following activities will help the teacher-coordinator prepare for this activity.

1. Read up-to-date career information, such as The Occupational Outlook Handbook.
2. Create and maintain a mutual understanding between the guidance counselor and the office education department as to job placement.
3. Inform the guidance counselor of current information on the office education curriculum by having available curriculum courses of study and course outlines for all business courses.
4. Arrange for the guidance counselor to visit the department for better understanding of the vocational education program.
5. Inform guidance counselor of the latest business trends and employment demands as they relate to office occupations.
6. Have available information about job performance evaluations of student-learners for the guidance counselor.
7. Refer notices of all job openings to the placement designate when they become known.
8. Work closely with local Job Services Office for placement of all student-learners who plan immediate job entry. (See Appendix D)
9. Discuss with cooperative student-learners possible alternatives for future employment.
10. Refer students to employers who request candidates for employment.

Phase XIV - Checklist No. 1 - Form C

Form C - PERSONAL RECORD CARD

Instructions: This form can be filled out during or at the end of the semester(s) the student-learner will complete the work experience. If it is placed on a file card, it can be part of a permanent record file.

PERSONAL RECORD CARD

Name ______________________________ Address __________________________________

OE Occupational Choice ____
Clerical--Secretarial--Accounting--Data Processing--

Courses Completed

	Credit	Grade	Competency
Typewriting - Rate ( )			
Shorthand - Rate ( )			
Accounting			
Office Machines			
Business Math			
Office Practice			
Business Law			
Data Processing			
Other:			

Average of Grades in Business Courses - Circle One: A B C D F

Work Experience:

Employer __________________________ Address _________________________________

Number of Hours of Work Experience ____

Evaluation of Work Performance ____
Fair--Good--Excellent

Job Possibilities ____
Type of job most qualified for

Use back side of card for future job placement and additional comments.

Phase XIV - PLACEMENT OF COMPLETER-LEARNERS

Checklist No. 2 - Utilization of Services Offered by the North Dakota Job Service

Objective: To learn how to utilize effectively the services provided by local job service offices.

Suggested Activities:

_____ 1. Determine how the North Dakota Job Service Office can best help you. Refer to Appendix D.

_____ 2. Contact the representative at the local or regional employment security bureau responsible for testing and evaluating. Explain to the representative what you want accomplished. See Form A.

Innovative Activities:

_____ 1. Utilize any individually administered test that you as a coordinator can administer.

How To Find A Job

Form:

A - List of Job Service Offices in North Dakota

Phase XIV - Checklist No. 2 - Form B

Form B - LIST OF JOB SERVICE OFFICES IN NORTH DAKOTA

Bismarck	216 - 2nd Street North	58501
Devils Lake	414 - 5th Street	58301
Dickinson	124 - 1st Avenue West P. O. Box 90	58601
Fargo	1350 - 32nd Street South P. O. Box 168	58102
North Dakota State University	Placement Bureau Memorial Union Building	58102
Grafton	728 Hill Avenue South P. O. Box 607	58237
Grand Forks	2016 South Washington P. O. Box 1637	58201
University of North Dakota (Teachers Placement Bureau)	University of North Dakota Law Building P. O. Box 8176 University Station	58201
Hillsboro	P. O. Box L	58045
Jamestown	429 - 2nd Street SW P. O. Box 780	58401
Mandan	501 - 1st Street NW P. O. Box 609	58554
Minot	3400 North Broadway P. O. Box 1727	58701
Newtown	P. O. Box 545	58763
Rolla	2 NE 3rd Street P. O. Box 425	58367
Valley City	120 East Main P. O. Box 509	58072
Wahpeton	524 2nd Avenue North P. O. Box 904	58075
Williston	422 1st Avenue West P. O. Box 1146	58801

PHASE XV

INCORPORATING MODEL OFFICE SIMULATIONS INTO THE BUSINESS CURRICULUM

PAGE

1. Defining and Selecting Model Office Simulations 202
   A. Criteria for Selection of Model Office Simulations 203
   B. Selected Model Office Simulations 206
   C. Simulated Office Package Evaluation Form............ 208
2. Developing Model Office Simulations.................... 210
   A. Steps in Developing a Model Office Simulation 211
3. Evaluating Model Office Simulations 213
   A. Product and Process Evaluation 214
   B. Simulation Process Evaluation Form 217
   C. Simulation Process Evaluation Form For Employee Use 219

PHASE XV
Incorporating Model Office Simulations
Into the Business Curriculum

PHASE XV - INCORPORATING MODEL OFFICE SIMULATIONS INTO THE BUSINESS CURRICULUM*

Checklist No. 1 - Defining and Selecting Model Office Simulations

Objective: To develop and utilize procedures for selecting effective simulations.

Suggested Activities:

_____ 1. Carefully review criteria for selecting model office simulations. See Form A.

_____ 2. Study descriptions of available model office simulations and order previewing materials. See Form B.

_____ 3. Evaluate package simulations using Form C.

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*Adapted from Simulation In Business and Office Education. Prepared by: Owen Fields, B. June Schmidt, and Jeffrey R. Stewart, Jr. Division of Vocational Education, Dept. of Education, Richmond, VA (May, 1978), pp. 43, 45, 50-56, and 65-74. (Unless otherwise noted)

Forms:

A - Criteria for Selection of Model Office Simulations

B - Selected Model Office Simulations

C - Simulated Office Package Evaluation Form

Phase XV - Checklist No. 1 - Form A

Form A - CRITERIA FOR SELECTION OF MODEL OFFICE SIMULATIONS

Definition of Simulation:

Simulation is the duplication in the classroom of activities found in an actual business office. It is used to pull together the multiple learning experiences of students and to maximize the transfer of training from the classroom to the business office.

Specific Selection Criteria:

A worthwhile model office simulation will provide numerous opportunities for each student to develop and use competencies as required on the job.

The selection of a model office simulation is typically based upon several criteria: objectives, time available, number and ability of students, cost of the simulation and associated materials, available facilities, and the experience of the teacher during the tryout of the materials.

I. OBJECTIVES

A. The job objectives of the instructional program will be the major determining factor in selecting the model office simulation.

B. What is the simulation geared toward?

1. Stenography - providing opportunities for students to take dictation and to transcribe.

2. Typewriting - preparing students for typewriting and related occupations.

3. Accounting and Data Processing - major objective is the preparation of accounting and data processing employees.

C. The teacher should determine which of several simulations provides the most opportunities for students to develop desired competencies.

II. TIME AVAILABLE

A. Can the simulation be expanded or contracted in length of time over what the publisher recommends?

B. Is adaptation of the simulation necessary to accommodate the time available?

III. NUMBER AND ABILITY OF STUDENTS

A. Is the simulation flexible in that various numbers of students can participate?

B. What are the minimum and maximum number of students that can take part?

C. The class may be split into two groups with each group operating a simulation independently of the other group.

D. What are the students' abilities and job objectives?

1. Is one job, rather than a range of jobs, appropriate?

2. Is a supervisory position with a wide range of responsibilities appropriate?

E. Consideration should be given to previous courses taken, job objectives, and work experiences of the students.

IV. COST OF SIMULATIONS AND ASSOCIATED MATERIALS

A. Factors such as reusability, duplication of materials and use of supplies can affect cost.

B. The teacher should try to predict and estimate total costs.

C. The identification and budgeting of total simulation costs in advance is a necessity.

V. AVAILABLE FACILITIES

A. A good model office simulation can be operated with a bare minimum of facilities.

B. The teacher should determine the best simulation for the students and then try to obtain the facilities necessary to do the best possible job with that simulation

Phase XV - Checklist No. 1 - Form A - Continued

VI. EXPERIENCE DURING TRYOUT

A. Possibly, the most important factor in selecting a model office simulation is the experience of the teacher during the time that the simulation is used on a trial basis with a group of teachers.

B. Experiences encountered in the operation of the simulation can be evaluated and appropriateness of the simulation for the intended students can be stressed.

Final selection of a model offic simulation should be based primarily on the objectives of the instruction.

Phase XV - Checklist No. 1 - Form B

Form B - SELECTED MODEL OFFICE SIMULATIONS

SIMULATION	SOURCE
1. A La Carte Enterprises	Gregg Division McGraw-Hill Book Company 330 West 42nd Street New York, New York 10036
2. Houston House	Gregg Division McGraw-Hill Book Company 330 West 42nd Street New York, NY 10036
3. Lester Hill Corporation	Gregg Division McGraw-Hill Book Company 330 West 42nd Street New York, NY 10036
4. Help, Incorporated	Instructional Materials Laboratory The Ohio State University 1885 Nell Avenue Columbus, Ohio 43210
5. Moe, Inc.	Utah State Board of Education 1400 University Club Building 136 East South Temple Salt Lake City, Utah 84111
6. The Patriot Company	The Patriot Company A Simulated Office Parkview High School Little Rock, Arkansas 72201
7. Right-On Records, Inc.	Beta Chi Chapter, Delta Pi Epsilon Dr. Robert J. Motley, Professor Business Education & Admin. Office Mgmt. Western Illinois University Macomb, IL 61455
8. Serendipity, Inc.	South-Western Publishing Company 5101 Madison Road Cincinnati, Ohio 45227

9.	Project In/Vest	Mr. Matthew A. Cantoni, Jr. National Association of Insurance Agents 85 John Street New York, NY 10038
10.	Star Confectioners	Western Tape P. O. Box 69 Mountain View, California 94042
11.	Trans-American Supply Company (T.A.S.C.)	Agency for Innovative Curriculum, Inc. 580 Sylvan Avenue Englewood Cliffs, New Jersey 07632

Phase XV - Checklist No. 1 - Form C

Form C - SIMULATED OFFICE PACKAGE EVALUATION FORM*

This evaluation form can be used when studying each simulation and results compared to other simulations and for future reference.

SIMULATED OFFICE PACKAGE EVALUATION FORM
FOR
SELECTING MODEL OFFICE SIMULATIONS

1. Name of Simulation ____________________

2. Publisher ____________________

3. Cost: Initial ____________________
   Replacement ____________________

4. Is duplication necessary ____________________

5. Number of employees necessary for simulation ____________________
   (maximum and minimum)

6. Length of time of simulation ____________________

7. Does the simulation serve the employee and teacher purposes that it was intended to serve? If undecided, please comment.

	Yes	No	Comment
a. Does the simulation meet your class objectives?	___	___	____________
b. Are simulation experiences comparable to those found in a real office?	___	___	____________
c. Does the work flow appear to constitute an interaction between students?	___	___	____________
d. Does the simulation contain employee, departmental, and administrative manuals?	___	___	____________
e. Is the work flow diagrammed clearly for student comprehension?	___	___	____________

Phase XV - Checklist No. 1 - Form C - Continued

	Yes	No	Comment
f. Does the simulation provide for individualized learning experiences?	____	____	______________________
g. Are your school facilities adequate to meet the needs of the simulation?	____	____	______________________
h. Are decision-making tasks incorporated into job situations?	____	____	______________________
i. Does the simulation provide an opportunity for debriefing sessions?	____	____	______________________
j. Are there suggestions for student evaluations?	____	____	______________________
k. Does the teacher function as a business consultant?	____	____	______________________

8. How would you rate this simulation on a scale of one to five? ________

ADDITIONAL REMARKS:

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*Developed by Dorothy Caroline, Wanda Kalamaha, Kathy Reichal, Roberta Talcott. Minot State College, Minot, ND (1980).

PHASE XV - INCORPORATING MODEL OFFICE SIMULATIONS INTO THE BUSINESS CURRICULUM*

Checklist No. 2 - Developing Model Office Simulations

Objective: To establish guidelines for the development of a model office simulation.

Suggested Activities:

_____ 1. Carefully review the steps that suggest some of the key elements essential to the development of a simulation. See Form A.

Form:

A - Steps in Developing a Model Office Simulation

---

*Adapted from Simulation In Business and Office Education. Prepared by: Owen Fields, B. June Schmidt, and Jeffrey R. Stewart, Jr. Division of Vocational Education, Dept. of Education, Richmond, VA (May, 1978), pp. 43, 45, 50-56, and 65-74. (Unless otherwise noted)

PHASE XV - Checklist No. 2 - Form A

Form A - STEPS IN DEVELOPING A MODEL OFFICE SIMULATION

The development of a model office simulation can provide insight into the actual operation of an office and can provide a means of meeting student objectives. It is a task that requires strong commitment on the part of the writer or writers. The order of steps to be followed in developing and writing a model office simulation will vary depending upon the experience of the creators; the type and complexity of the simulation; and the personal, organizational, and writing abilities of the creators.

SPECIFIC DEVELOPMENT STEPS

Step 1 Review objectives of the business and office education program and job objectives of the students.

Step 2 Assemble the writing team, if appropriate. Set general time schedule for completion.

Step 3 Write the performance goals and objectives for the simulation. Review and refine. Test against overall program and individual student objectives.

Step 4 Determine the length of time to be covered by the simulation. List alternate business organizations to be simulated.

Step 5 Visit representative business firms of types identified in Step 4. Study office systems to be simulated.

Step 6 Select a business to simulate that best meets identified objectives. Consider if or how the outside business world is to be simluated.

Step 7 Visit businesses of the type to be simulated. Gather extensive and detailed information and sample forms for the office procedures and systems to be simulated.

Step 8 Develop a preliminary design for the simulation. Include goals and objectives, type of business, departmental organization, work stations, forms, activities, outside business world, number of employees, job rotation ideas, evaluation ideas and a general plan for getting the simulation started.

Step 9 Set specific time goals for remaining steps.

Step 10 Modify the steps in the work flow of the real businesses to meet requirements of a simulated office. For example: simplify forms, design work input to permit graduated difficulty, omit costly multiple forms where possible. Further modifications may be necessary to assure representative practice for objectives that relate to mathematics and verbal skills, human relations skills, and motor skills.

Phase XV - Checklist No. 2 - Form A - Continued

Step 11 Obtain permission from the businesses to adapt or use the business forms and procedures.

Step 12 Develop a working design for the simulation. Redesign forms, if necessary. Further clarify departmental organization, work stations, activities, procedures, and specific responsibilities of each employee.

Step 13 Prepare first draft of instructions for the simulation (employee's manual). Test for readability and clarity with students.

Step 14 In cooperation with other teachers, do a "walk-through" of the simulation to see if there are gaps or bottlenecks in the flow of work.

Step 15 Settle on final design for the simulation. Have students help students select a name for the business.

Step 16 Assemble all business forms and materials in final form. Prepare final draft of employee's manual.

Step 17 Develop an employer's manual to include goals and objectives, start-up activities, evaluation techniques, enrichment activities, rotation suggestions, keys if applicable, and ending activities. Also, include equipment, mateirals, and supplies needed in the simulation.

Step 18 Try the simulation with students. Modify the simulation as necessary.

The preceding guidelines are provided to help the teacher follow a logical sequence in the development of a simulation; they are not intended to serve as complete guides. Obviously, actual experience in the development of a simulation is the best way to learn the "ins" and "outs" of the process.

PHASE XV - INCORPORATING MODEL OFFICE SIMULATIONS INTO THE BUSINESS CURRICULUM*

Checklist No. 3 - Evaluating Model Office Simulations

Objective: To establish guidelines for the proper evaluation of a simulation and its employees.

Suggested Activities:

_____ 1. Carefully review process and product evaluations as discussed in Form A.

_____ 2. Incorporate the use of forms A, B, and C for evaluation purposes.

GOOD MORNING!!

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*Adapted from Simulation In Business and Office Education. Prepared by: Owen Fields, B. June Schmidt, and Jeffrey R. Stewart, Jr. Division of Vocational Education, Dept. of Education, Richmond, VA (May, 1978), pp. 43, 45, 50-56, and 65-74. (Unless otherwise noted)

Forms:

A - Product and Process Evaluation

B - Simulation Process Evaluation F

C - Simulation Process Evaluation Form For Employee Use

Phase XV - Checklist No. 3 - Form A

Form A - PRODUCT AND PROCESS EVALUATION

Before a simulation is implemented, the teacher must consider the objectives it will meet and plan how to assess whether or not these objectives have been met. Both the simulation process and the simulation participant, or product, must be evaluated in order to examine achievement of the objectives.

Two basic principles of evaluation to remember when assessing a simulation follow:

1. Evaluation is a process of assessing the extent to which the objectives of an endeavor have been accomplished, the identification of the strengths and weaknesses, and the design of a plan for improvement.

2. Evaluation is meaningful only when it is designed as a learning experience for the learner and is used in that manner.

Evaluation as stated in the first principle is a process; it is ongoing and not conducted only as a concluding activity.

PROCESS EVALUATION

Before assessing what the learner has achieved, the learning situation must be assessed. In process evaluation, the over-all question to be considered is whether or not the educational purposes of the learning activity are being achieved.

Forms B and C are instruments that can be used to examine various aspects of the question. Note that the first section of the instruments deals with purposes and objectives of the simulation for the employee and the second section with purposes of using the simulation by the teacher.

Debriefing sessions scheduled periodically throughout the simulation are an ideal time to discuss and decide on modifications appropriate for improvement of the simulation.

Prior to debriefing sessions, the teacher may find a process evaluation instrument completed by the employees useful. A suggested instrument appears as Form C. This instrument will help employees focus on possible trouble areas as well as provide a basis for discussion at the sessions.

At the conclusion of the simulation, the process evaluation instruments should be completed by both the teacher and the employees. Information secured from this final evaluation can then be used as a reference when implementing future simulations.

PRODUCT EVALUATION

Learner evaluation serves the purpose of helping the learner identify progress toward known goals. The product evaluation procedure is an ongoing process. Evaluation enables the learner and the teacher to identify weaknesses and strengths of the learner and to assess these in relation to the terminal learning objectives of the activity for the learner.

For model office simulation, various employee evaluation techniques can be used. They include:

1. *Observation* - The use of performance appraisal sheets by both the employees and teacher.
2. *Self-Observation* - Check sheets designed for the purpose of evaluating self-performance.
3. *Controls* - Measures for items such as quantities of work produced, time required for completion, materials used, percentages of defective work acceptable, and time spent on non-productive activitiy can be established.
4. *Attitude Scales* - Employee behavior throughout the simulation can be assessed in respect to known desirable behaviors for the office situation.
5. *Models (samples)* - Samples of the work at each station will provide employees a means of determining if their work has been completed correctly.
6. *Simulated Paychecks* - A weekly paycheck to reflect employee performance can be used.
7. *Samples of Work* - Work completed, filing accuracy, and accuracy of computations can be examined.
8. *Written Test* - Items requiring a knowledge of simulation flow charts, organization charts, company history, sales policies, special vocabulary, duties of simulation positions, and task description are examples of items that can be included on written tests.

Regardless of the evaluation method(s) used, the outcomes are made known to the employee through an evaluation conference. The purpose of the conference is to provide the learner with feedback on what has been learned, performance effectiveness, and improvements needed.

Employee evaluation followed by an evaluation conference is scheduled on a periodic basis throughout the simulation. The evaluation process is ongoing and is used for the purpose of improvement.

Grades are assigned on the basis of achievement in respect to office standards and in respect to goals established for individual employees. Grades are necessary and, certainly, a good evaluation procedure, makes their determination much simpler. Evaluation of employee progress in a simulation has the primary purpose of improvement.

Phase XV - Checklist No. 3 - Form B

Form B - SIMULATION PROCESS EVALUATION FORM

SIMULATION PROCESS EVALUATION

I. Does the simulation serve the employee purposes and objectives it was intended to serve?

	Yes	No	Modification Possible
For example:			
a. Is the extent of student participation above that achieved in the normal classroom situation?			
b. Do students accept responsibility for their own work?			
c. Are simulation experiences comparable to those found in a real office?			
d. Are student exposed to a variety of interpersonal relationships typical of an office setting?			
e. Is there a range in the difficulty level of the work required at various stations?			
f. Are on-the-job performance standards required?			
g. Are students confronted with decision-making situations?			
h. Is the flow-of-work concept stressed?			
i. Is productivitiy as well as quality stressed in work performance?			
j. Are habits of work organization being developed?			
k. Other?			

COMMENTS:

Phase XV - Checklist No. 3 - Form B - Continued

II. Does the simulation serve the teacher purposes it was intended to serve?

	Yes	No	Modification Possible
For Example:			
a. Could the same results be achieved by another instructional approach?	____	____	______________
b. Is the simulation atmosphere compatible with the instructional atmosphere considered appropriate by the teacher?	____	____	______________
c. Does the simulation provide for individualized learning experiences?	____	____	______________
d. Are the desired competencies being developed?	____	____	______________
e. Are the physical facilities adequate to conduct the simulation?	____	____	______________
f. Is the preparation time required of the teacher adequate?	____	____	______________
g. Is the teacher functioning as an office manager?	____	____	______________
h. Is the atmosphere that has been established that of a real office?	____	____	______________
i. Should the use of a different simulation be considered?	____	____	______________
j. Other?	____	____	______________

COMMENTS:

Phase XV - Checklist No. 3 - Form C

Form C - SIMULATION PROCESS EVALUATION FOR EMPLOYEE USE

SIMULATION PROCESS EVALUATION FOR EMPLOYEE USE
(To be completed by the employees before debriefing sessions)

		Yes	No
a.	Do you have a positive attitude toward the simulation?	____	____
b.	Are you fully using the time you have at your work station?	____	____
c.	Are your skills (typing, computation, communication) improving?	____	____
d.	Do you feel a sense of responsibility for your work?	____	____
e.	Are you learning to work with others?	____	____
f.	Can you follow the written directions for your work station?	____	____
g.	Can you follow oral directions given by others?	____	____
h.	Are you learning to give oral directions to others?	____	____
i.	Are the materials you use at your work station organized?	____	____
j.	Do you think the simulation activities will help you later on the job?	____	____
k.	Are you concerned about the quality of your work?	____	____
l.	Have you had trouble communicating with others in the simulation?	____	____
m.	Have you developed a feeling of loyalty to the simulation company?	____	____
n.	Are you able to assign priorities to the work you receive?	____	____
o.	Other?	____	____

PHASE XVI

FOLLOW-UP OF COMPLETER-LEAVER

PAGE

1. Year End Follow-Up.. 220

2. In-Depth Follow-Up 221

   A. Follow-Up Study Questions for Cooperative Business Education Programs 222

   B. Suggested Outline for Analyzing the Results of Follow-Up Study 225

   C. Student Follow-Up Survey 227

      (1) Cover Letter for Student Follow-Up 229

      (2) Reminder Letter for Student Follow-Up............ 230

      (3) Reminder Card for Student Follow-Up.............. 230

   D. Employer Follow-Up Form 231

      (1) Cover Letter for Employer Follow-Up............... 232

      (2) Reminder Letter for Employer Follow-Up 233

PHASE XVI - FOLLOW-UP OF COMPLETER- LEAVERS

Checklist No. 1 - Year End Follow-Up

Objective: To make periodic follow-up of completer-leavers to improve the instructional program.

Suggested Activities:

_____ 1. Organize a placement service to follow-up completer-leavers of the cooperative program into the labor market. Refer to Phase XIV, page 195-199.

_____ 2. Cooperate with the nearest job service in finding positions for students completing the office education program. Refer to Phase XIV, page 200-201.

_____ 3. Keep a record of those students who go on for further education after completing the program. Are they working part-time in their career field to help pay their expenses?

_____ 4. Keep files and records of each completer-leavers current or periodic follow-up of former students.

PHASE XVI - FOLLOW-UP OF COMPLETER-LEAVERS

Checklist No. 2 - In-Depth Follow-Up

Objective: To determine employment status of completer-leavers receive opinions of former student-leavers and to evaluate the overall program.

Suggested Activities:

_____ 1. Determine if follow-up is to be at one, three, or five-year intervals.

_____ 2. Plan survey instrument which will give the following information:

a. Retention in same job
b. Employment in related field
c. Additional education or training
d. Unemployment history
e. Salary, advancement, job duties.

See Form A for an example of a questionnaire.

_____ 3. See Form B for analysis of a questionnaire.

Forms:

A - Follow-Up Study Questions For Cooperative Business Education Programs

B - Suggested Outline For Analyzing The Results Of Follow-Up Study

C - Student Follow-Up Survey*

C-1 Cover Letter for Student Follow-Up*

C-2 Reminder Letter for Student Follow-Up*

C-3 Reminder Card for Student Follow-Up*

D - Employer Follow-Up Form*

D-1 Cover Letter Employer Follow-Up*

D-2 Reminder Letter For Employer Follow-Up*

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*Ronald W. Stadt and Bill G. Gooch, Cooperative Education: Vocational-Occupational-Career, The Bobbs-Merrill Company, Inc., Indianapolis, Indiana, (1977), pp. 328-332, 334-336.

Phase XVI - Checklist No. 2 - Form A

Form A - FOLLOW-UP STUDY QUESTIONS FOR COOPERATIVE OFFICE EDUCATION PROGRAMS

FOLLOW-UP STUDY QUESTIONS
FOR COOPERATIVE OFFICE EDUCATION PROGRAMS

This survey is being conducted in order to obtain facts regarding jobs and the effectiveness of school training for these jobs. The information collected will be used in adjusting future plans. All information will be regarded as strictly confidential. Names will not be used in the completed survey.

Name ______________________ Maiden Name ______________________

Address ____

Date ______________________ Year of Graduation ______________

1. Are you employed? __________ Yes __________ No

   (a) Full-time ______________ Part-time ______________

   (b) Job title ______________________________________

   (c) Specific duties ________________________________

   (d) Employer or Supervisor __________________________

   (e) Address ____

2. How did you obtain present position?

   (a) _____ Tips from friends, relatives, etc.
   (b) _____ Personal solicitation
   (c) _____ Employment office
   (d) _____ Private employment agency
   (e) _____ School employment office
   (f) _____ Other: Please explain ____________________

3. What pre-training was necessary for your occupation?

   (a) _____ High School
   (b) _____ Business School
   (c) _____ Other: Please explain ____________________

4. In the list of job activities given, check in column 1 the activities that are included in your responsibilities. In column 2, check the activities for which you feel high school business education courses, including cooperative business education, prepared you.

JOB ACTIVITIES	Responsibilities 1	Activities 2
Cashier work		
Compose letters		
Cut stencils		
File and index materials		
Handle incoming and outgoing mail		
Information desk work		
Keep checkbook		
Make appointments		
Make original entries		
Make out bills for customers		
Make payrolls		
Operate full-keyboard adding machine		
Operate ten-key adding machine		
Operate fluid duplicator		
Operate transcribing machine		
Operate key-punch machine		
Operate verifier		
Operate photocopy machine		
Operate computer		
Computer programmer		
Operate switchboard		
Post		
Prepare financial reports		
Proofreading		
Receive callers		
Reconcile bank statements		
Take inventory		
Take dictation and transcribe		
Type envelopes		
Type (straight copy)		
Use electric typewriter		
Use reference books		
Use telephone		
Use timetables and make reservations		

5. Have you changed jobs or received a promotion?

(a) _____ Have received a promotion to a higher-rated job with this company
(b) _____ Have not received an advancement or promotion with this company
(c) _____ Have changed jobs _____ times since graduation. Reason for changing jobs ______________________________
____

Phase XVI - Checklist No. 2 - Form A - Continued

6. If you are not employed, are you available for employment? ____ Yes ____ No
If you are not available for employment, check your status:

(a) _____ Armed Forces
(b) _____ Full-time school
(c) _____ Homemaker
(d) _____ Other ____

7. Have you had post high school training? If so, check the type:

(a) _____ College
(b) _____ Business School
(c) _____ Adult-Day School
(d) _____ Adult Evening School
(e) _____ Correspondence School
(f) _____ Other ______________

8. What business education courses taken in high school were most helpful to you? Indicate by 0 - not applicable, 1, 2, 3, etc., the order of helpfulness:

_____ Typewriting I
_____ Typewriting II
_____ Shorthand I
_____ Shorthand and Transcription
_____ Bookkeeping I
_____ Bookkeeping II
_____ Business Mathematics
_____ Cooperative Business Education
_____ General Business
_____ Business Law
_____ Business English
_____ Office Machines
_____ Computer Science

9. What business education courses not offered, do you wish you could have taken? ____

10. List the business education courses which were least helpful: _________
____

11. Of the business education courses offered in your high school, list the courses you wish you had taken: ______________________
____

12. Do you think high school students should work part-time while attending school? ___ Yes ___ No Remarks: ______________________
____
____

13. List below the suggestions you have for improving the vocational office training program: ______________________
____
____
____

Phase XVI - Checklist No. 2 - Form B

Form B - SUGGESTED OUTLINE FOR ANALYSING THE RESULTS OF FOLLOW-UP STUDY

SUGGESTED OUTLINE FOR ANALYZING THE RESULTS OF FOLLOW-UP STUDY

For

School Year Ending ______

____________________ High School ____________________ County

Teacher-Coordinator ____

Data Reported as of ____

	MALE	FEMALE	TOTAL
I. Total number of COE completer-leavers.	______	______	______
II. Number not presently employed:	______	______	______
A. Entered armed forces	______	______	______
B. Continued full-time school	______	______	______
C. All other reasons	______	______	______
III. Employed or available for employment: (add A, B, and C of Item II. and subtract from Item I.)	______	______	______
IV. Number obtaining full-time jobs:	______	______	______
A. In occupation for which trained	______	______	______
B. In field related to training	______	______	______
C. In field not related to training	______	______	______
V. Total number obtaining full-time jobs: (total of A, B, and C of Item IV.)	______	______	______

VI. Job activities:

A. In Column 1, give the number of COE completer-leavers by the activities that are included in their responsibilities.

B. In Column 2, give the number of COE completer-leavers by the activities they feel high school business education courses, including COE, prepared them.

Phase XVI - Checklist No. 2 - Form B - Continued

	MALE	FEMALE	TOTAL
VII. Number employed part-time: (do not include COE completer-leavers reported in B of Item II. who are working part-time)	______	______	______
VIII. Number unemployed or not available for placement:	______	______	______
IX. Number status unknown:	______	______	______

X. Weekly salary range for graduates employed full-time:

A. $31 to $40 ______

B. $41 to $50 ______

C. $51 to $60 ______

D. $61 to $70 ______

E. $71 to $80 ______

F. $81 to $90 ______

G. $91 to $100 ______

H. $101 to $110 ______

I. $111 to $120 ______

J. ____________________

XI. Post-high school training:
Give the number of COE graduates by type of additional training since high school graduation.

A. College ______

B. Business School ______

C. Adult-Day School ______

D. Adult-Evening School ______

E. Correspondence School ______

F. Other (specify) ________ ______
____

Phase XVI - Checklist No. 2 - Form C

Form C - STUDENT FOLLOW-UP SURVEY*

(Name of COE Program here)

BACKGROUND INFORMATION

1. Name ____________________
2. Address Street ____________________
   City ____________ State ____________ Zip ________
3. Telephone number ____________________
4. Person who will always know your address:
   Name ____________________
   Street ____________________
   City ____________ State ____________ Zip ________

5. Marital Status		5. Military Status	
single	________	active	________
married	________	reserve	________
divorced	________	veteran	________
		does not apply	________

6. Employment Status (check one)
   ________ working
   ________ working and looking for a different job in my line of work
   ________ working and looking for a job in a new line of work
   ________ not working and not looking for work
   ________ not working and looking for work
7. Employment history (complete appropriate blanks)

month & year		employer	job title	hourly or monthly (pay optional)

8. Employment expectations (check one)
   ________ remain in present job
   ________ remain in present occupation but change employers
   ________ advance in my line of work
   ________ change lines of work
   ________ discontinue working
   ________ return to working as soon as I can

EDUCATION HISTORY AND PLANS

9. Since attending ________ (name of program here) I attended

10. In future I plan to attend

9.		10.
______	trade school	______
______	technical institute	______
______	community college	______
______	four year college	______
______	military school	______
______	adult classes	______

11. Suggestions for improving name of program here
(circle one response for each item)

SA	strongly agree
A	agree
SD	strongly disagree
D	disagree
N	neither agree nor disagree

It would be better to:

SA	A	N	D	SD	begin classroom experiences earlier.
SA	A	N	D	SD	begin laboratory experiences earlier.
SA	A	N	D	SD	begin coop experiences earlier.
SA	A	N	D	SD	vary coop experiences more.
SA	A	N	D	SD	deal more with manuals & reference books.
SA	A	N	D	SD	deal more with job information & advancement.
SA	A	N	D	SD	deal more with educational opportunites.
SA	A	N	D	SD	provide more job placement services.
SA	A	N	D	SD	provide more information about scholarships.
SA	A	N	D	SD	provide more individual instruction.
SA	A	N	D	SD	provide more leadership training.
SA	A	N	D	SD	provide more decision making experiences.

12. Comments

The one most valuable feature of the program was ______________________

because ____

____

____

The best way to improve the program would be to ______________________

____

____

Phase XVI - Checklist No. 2 - Form C-1

Form C-1 - COVER LETTER FOR STUDENT FOLLOW-UP *

COVER LETTER FOR STUDENT FOLLOW-UP

(school letterhead)

(date)

(name)
(street)
(city)

Dear (use first name if appropriate):

We are conducting a survey of people who attended the ________________ program. The enclosed form requires only a few minutes of your time and will help us to improve the program. Your responses will be held in strict confidence.

Please complete the form and return it in the self-addressed envelope.

I shall be personally grateful to you.

Sincerely,

(name)
Coordinator

Enclosure

Phase XVI - Checklist No. 2 - Form C-2

Form C-2 - REMINDER LETTER FOR STUDENT FOLLOW-UP*

(letterhead)

(date)

(name)
(street)
(city)

Dear (use first name if appropriate):

We are anxious to summarize results of our survey and not that we do not have your response to an earlier mailing. Please use the enclosed form and envelope so that we may have your valuable input.

I shall be personally grateful for your immediate response.

Sincerely,

Coordinator

Enclosure

Phase XVI - Checklist No. 2 - Form C-3

Form C-3 - REMINDER CARD FOR STUDENT FOLLOW-UP*

(date)

Dear ________________,

Recently, we mailed a survey form, asking you to help us improve the ________________________ program. Because the mailing has not been returned to us, we assume that you are going to complete the form and return it. Please do so at your earliest convenience.

Sincerely,

Coordinator

Phase XVI - Checklist No. 2 - Form D

Form D - EMPLOYER FOLLOW-UP FORM*

EMPLOYER FOLLOW-UP FORM

(name of COE program here)

1. Name of Employer or Supervisor ____________________
2. Establishment ____________________
3. Name of Employee ____________________
4. Employee's graduation date ____________________
5. What is your job title? ____________________
6. What is the employee's job title: ____________________
7. In what capacity are you related to this employee? ____________________
8. Employee Characteristics:
(Circle the response which best describes your opinion)

SA	strongly agree	D	disagree
A	agree	SD	strongly disagree
N	neither agree or disagree		

This employee is:

SA	A	N	D	SD	punctual.
SA	A	N	D	SD	reliable and dependable.
SA	A	N	D	SD	eager to get along with others.
SA	A	N	D	SD	well mannered.
SA	A	N	D	SD	better prepared than people from other preparatory programs.
SA	A	N	D	SD	thorough and accurate.
SA	A	N	D	SD	doing high quality work.
SA	A	N	D	SD	competent with planning and mental tasks.
SA	A	N	D	SD	competent with manual tasks.
SA	A	N	D	SD	willing to be supervised.
SA	A	N	D	SD	pleased to take suggestions.
SA	A	N	D	SD	adaptable.
SA	A	N	D	SD	able to make good judgments.
SA	A	N	D	SD	likely to be promoted in average time.
SA	A	N	D	SD	likely to benefit from additional education and training.
SA	A	N	D	SD	likely to get ahead.
SA	A	N	D	SD	safety conscious.

9. Comments

The one outstanding strength of this employee when he/she came to work here was ____________________.

The one outstanding weakness of this employee when he/she came to work here was ____________________.

The two skills or personal qualities which I value most in new employees are ____________________.

Phase XVI - Checklist No. 2 - Form D-1

Form D-1 - COVER LETTER EMPLOYER FOLLOW-UP *

COVER LETTER EMPLOYER FOLLOW-UP

(school letterhead)

(date)

(name)
(street)
(city)

Dear ______________,

We are conducting a survey of employers or supervisors of people who attended the _____________________________ program. The enclosed form takes only a few minutes to complete. We would like the immediate supervisor or someone who is familiar with the performance of (graduate's name) to complete the form and return it in the enclosed envelope.

Please be assured that responses will be held in absolute confidence.

Results of this survey will be used to improve the _________ __________________ program. and related services.

I shall be personally grateful to you.

Sincerely,

Coordinator

Enclosure

Form D-2 - REMINDER LETTER FOR EMPLOYER FOLLOW-UP *

REMINDER LETTER FOR EMPLOYER FOLLOW-UP

(letterhead)

(date)

(name)
(street)
(city)

Dear ____________________ ____________________________________

We are anxious to summarize results of our survey of people who attended the _________________ program and note that we do not have a response from the supervisor of (graduate's name). We hope that the supervisor or someone who is familiar with this employee's performance will complete the enclosed form and mail it in the enclosed envelope before week's end.

I shall be personally grateful for your attention to this important matter.

Sincerely,

Coordinator

Appendix

APPENDIX A

COOPERATIVE OFFICE EDUCATION TRAINING SUPERVISOR HANDBOOK* PAGE

1. The COE Program 235

2. The COE Teacher/Coordinator 238

3. The COE Training Station. 241

   A. How Selected 242
   B. Responsibilities. 243
   C. Advantages 244

4. The COE Student 245

5. Supervision 247

   A. Orientation 248
   B. How To Supervise Student-Learner 249
   C. What to Teach 250

6. Forms and Agreements 251

   A. Office Occupations Program Agreement 253
   B. Memorandum of Training Plan 255
   C. Step-by-Step Training Plan 256
   D. Occupational Outline and Training Plan 261
   E. COE Work Experience Job Rating Sheet 263
   F. Evaluation of Student-Learner 264
   G. Student-Learner Weekly Report 267
   H. Progress Report 268
   I. Checklist for Evaluating Cooperative Programs 269

7. Glossary 273

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*Taken from Distributive Education Training Sponsor Handbook, by Renee Wonser, Minot High School, Magic City Campus, Minot, ND.

Cooperative
Office
Education

Training
Supervisor
Handbook

____________ HIGH SCHOOL

____________, N. DAK.

Thank

you...

for accepting the position as a Training Supervisor for an Office Education Student. You are accepting a task of great responsibility which should be a rewarding experience for you. Without the cooperation of you and your business organization, this program of training would not be effective.

This handbook was designed to assist you in the training of the student. The student will study various aspects of your business in the classroom and is expected to gain practical experience in the laboratory - the training station. As a result of these experiences gained with the help of your knowledge and understanding, the student should develop into a competent employee, ready to take his or her place in the field of business.

The teacher/coordinator will be available to answer any questions you may have, so feel free to call on him/her for any assistance you need. The number at ____________ High School is ____________ extension ______.

The pages that follow will familiarize you with the Cooperative Office Education program, your responsibilities, the coordinator's responsibilities, and the forms you will need to become acquainted with.

Now that you are a partner in education, you may want to avail yourself of suggestions for teaching, supervision, and training. Since this is a cooperative venture, the suggestions work both ways: take yours to the coordinator whenever you believe there is room for improvement. The comments will be greatly appreciated.

Again, thank you for becoming a training supervisor.

The

COE

Program

Cooperative Office Education is a three-pronged program of study: classroom instruction, on-the-job training, and FBLA. Upon completion of the program the student will be ready to take his place in the world of work or have a good foundation for further study in a field of his choice.

The highlights of the three parts of the program are:

1. Classroom Instruction

   The student is enrolled in academic subjects along with a regular class in Office Education.

   Instruction is both basic (generally applicable to the entire field of business) and specific (related directly to student's field of training).

   The coordinator correlates instruction to specific job requirements and individual needs.

   The student spends half of his day in classroom instruction and the other half in a relevant training experience.

2. On-The-Job Training

   Students become members of the business organization's staff of employees on a part-time basis, receiving regular wages.

   Students learn by doing, putting into practice the knowledge which they have gained through classroom study.

   During the school week students work an average of 15 hours weekly on the job, in order to fulfill the required hours for graduation credit.

   Students are supervised by trained, experienced employees, according to a preplanned schedule of work experiences.

3. **FBLA (Future Business Leaders of America)**

SERVICE EDUCATION PROGRESS

FUTURE
BUSINESS
LEADERS
AMERICA

FBLA - a vital part of the local Office Education program is a national youth organization of Cooperative Office Education students with local chapters in each state.

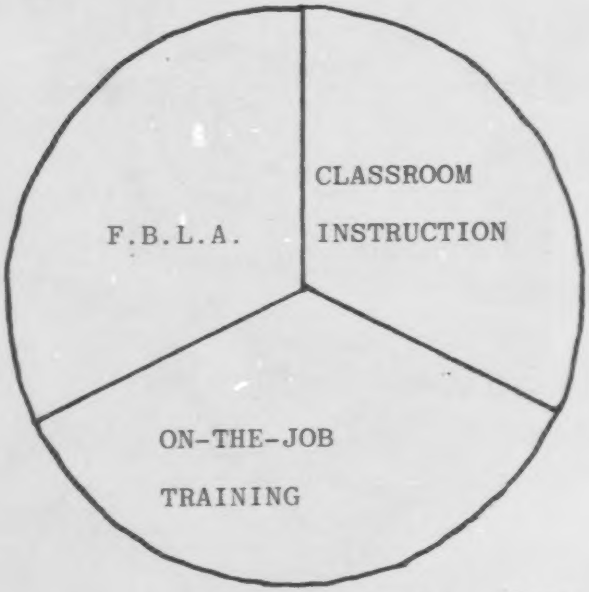
FBLA's program is designed to:

** develop competent, aggressive business leadership

** strengthen the confidence of young men and women in themselves and their work

** create more interest and understanding in the intelligent choice of business occupations

At various times throughout the year it may be necessary for the student to be absent from work because of his participation in FBLA activities. When this occurs, ample notice will be given to the employer indicating the dates of absence.



The COE Teacher/Coordinator

The Cooperative Office Education Teacher/Coordinator is generally a college graduate with broad training in both business and education. One requirement common to all teacher/coordinators is that he or she have actual work experience in some occupation in business. In the transition from business to education, the coordinator brings a real understanding of business, its problems and needs to his or her students. As a training supervisor, when you talk to a teacher/coordinator, you are speaking to a fellow businessperson who is equipped to know your situation.

COOPERATIVE OFFICE EDUCATION TEACHER/COORDINATOR
PERSONAL DATA SHEET

Name:

School Address:

School Phone:

Home Address:

Home Phone:

Education:

MSEd:

Major:

Minor:

BSEd:

Major:

Minor:

Work Experience:

General Information:

References:

The Teacher/Coordinator Will:

** provide qualified part-time student-learners who will mature with job experience and become proficient employees of the organization.

** assist in establishing a suitable training program and schedule for the individual student-learner.

** cooperatively develop individual study guides for classroom work which will provide the student-learner with specific information which relates directly to his job and area of training.

** work closely with you, the training supervisor, to insure a sound training program for the individual student-learner.

** evaluate the student-learner's progress regularly to insure satisfactory job performance.

** maintain a close working relationship with the management and training supervisors.

** assist you, the training supervisor, in every way to fulfill each student-learner's occupational objective and training needs.

** provide current information on business trends. And finally,

** provide access to adult education.

The

COE

Training Station

282

1. HOW SELECTED

The training station is the laboratory in which the student-learner applies the knowledge and skill learned in the classroom as well as learns first hand the inner workings of a going business organization. Since the training station plays such an important role in helping the student-learner attain his occupational objective, selection of a high quality firm is a prime concern in the Cooperative Office Education program.

Characteristics which serve as a basis for selection include:

** Ability to provide training consistent with student-learner's occupational objective

** Ability to provide a variety of supervised learning experiences (Minimum of 15 hours average per week for the school year).

** Willingness to cooperate with student-learner and coordinator to develop and follow a training plan outlining the learning experiences necessary to accomplish the stated occupational objective.

** Willingness to participate in periodic evaluation of student-learner progress, and

** Willingness to accept responsibility for training. Such responsibility to be performed by the employer or a designated training supervisor.

Once a potential training station has been selected by the coordinator, a student or students with occupational objectives consistent with the firm's business functions will be sent to interview for each training position established by the business. The training station makes the decision as to who will be employed.

2. RESPONSIBILITIES

As a training supervisor you are asked to:

** provide suitable employment for part-time student-learners, offering an opportunity for job experience and learning.

** plan a work schedule that will lead to job progression and introduction to other office activities of the business.

** cooperatively develop and periodically review the training plan.

** appoint a qualified, experienced employee to supervise the student-learners on the job.

** work closely with the coordinator in carrying out the student's training objective.

** encourage the student-learners to develop good work habits and attitudes.

** provide the coordinator with training materials which your organization may have on hand.

** volunteer to speak to student groups, club organizations, and in classrooms about your business, its opportunities, and its career possibilities.

** make suggestions which you think could improve the program and strengthen the training.

** encourage other businesspersons such as yourself to engage in training activities.

** pay a fair and equitable wage in relation to the student-learner's skill, ability, and experience.

** make the student's work hours sufficient for training, but allowing reasonable time for study and relaxation.

3. ADVANTAGES

The Cooperative Office Education program offers several advantages and opportunities to a participating employer and his place of business:

1. **Assistance in training youth as new employees.** . . The COE Coordinator shares the responsibility of orienting young people to work and all its requirements.

2. **Reduces turnover in personnel.** . . COE creates professional employees whose occupational objective fits into the present and future needs of your business.

3. **Is economical.** . . cost is not greater than for regular untrained part-time employees. COE saves training time and money by supplementing your training programs.

4. **Builds school-employer relations**...

5. **Assists in keeping your workers in the community.** . . Gets competent young people started in the business opportunities in your community with an understanding of the future opportunities local business can provide.

6. **Provides a source of full-time employees.** . . Opportunity to select future key personnel from a select group of young, interested people.

7. **Provides training for your full-time adult employees.** . . The Cooperative Office Education Coordinator and adult consultants from the State Vocational Education Department, are available to help provide additional adult training programs and solve training related problems.

The

COE

Student

RESPONSIBILITIES

In each Cooperative Office Education program, the responsibilities of the students vary, but the following are believed to be at least basic requirements.

Students should:

1. Attend school on a regular basis. If the student is unable to attend school in the morning, he will not be permitted to work that day. In case of absence, the employer and the school should be notified by 10:00 in the morning.

2. Display good conduct at all times. Any misconduct may result in removal from the program.

3. Maintain passing grades in all subjects. The coordinator reserves the right to adjust school and work schedules, if need be, consistent with the needs of the business to insure passing grades in all school subjects.

4. Notify the coordinator before quitting a job. The student may not quit a job without the prior approval of the coordinator and the training station supervisor.

5. Maintain an appearance which conforms to those standards of dress and grooming expected of the employees at the training station.

6. While enrolled in the program, be employed on only one job, and that would be the approved training station.

Finally, while the student-learner is performing duties at the training station, he is subject to the same rules and regulations as any full-time or part-time employee. However, since the training station is an extension of the classroom, any problem that arises can be met by the combined efforts of the supervisor and the coordinator. The student-learner, when hired in the training station, is considered to have accepted a position through the end of the school year. In no case will a student-learner be allowed to terminate his employemnt without the approval of the coordinator. Failure of the student to carry out any of these responsibilities could result in the removal of the student from the program.

SUPERVISION

1. ORIENTATION

1. Orientation to the business, employees, and operation is vital.
2. Assign the student to a training supervisor, give him a definite schedule, and instruct him in job responsibilities.
3. Put him on your team and remind him that he must be productive and dependable and show ability to progress.
4. Remind him that he is in a training situation and that you will expect him to perform to the best of his ability.
5. Inform him that you and the coordinator will evaluate his work regularly and that you will grade his job performance and progress.
6. Inform the student of his acceptance as an employee and let him know where he stands with you; never keep him guessing.
7. Reward the student with a pat on the back for a job well done as readily as you would criticize him for errors and lack of judgment.
8. Teach him the importance of profits to your business and to himself; expect high standards of work and productive performance.
9. Guide him in developing proper work habits and attitudes, and help him increase his skills and knowledge.
10. Correct faulty judgments and improper techniques before they become habitual.
11. Confer with the coordinator regularly regarding the student's training; keep appropriate matters confidential.

2. HOW TO SUPERVISE STUDENT-LEARNER

The student-learner you have employed is a human dynamo, bubbling with energetic enthusiasm and full of young ideas--but lacking in self-confidence. He is shy, eager to please, and wanting acceptance by the employees and management.

Your job of supervision is largely a matter of allowing the student-learner to find himself. You will be required to exhibit patience, understanding, tact, tolerance--all mixed with a sense of humor.

Supervision should draw the best from the student-learner. Stimulate his thinking, ask his opinions, give him responsibility, recognize his ability, and teach him to accept his limitations. Supervision is based on these sound rules.

1. Assign work within reasonable bounds of physical strength.
2. Remember that youngsters have outbursts of emotions and exhibit poor behavior at times, rebelling at authority. Ignore them (if possible), and the situation will generally correct itself.
3. Give criticism fairly, without emotions and let student-learners discover their own mistakes.
4. Use the "We" rather than "I" approach.
5. Put student-learners on your team, treat them as adults, and reward good deeds with added responsibility.
6. Expect the best from trainees. Never accept poor quality; teach them pride in a job well done.
7. Give instructions clearly, telling why as well as how.
8. Set a good example for student-learners to follow.
9. Point student-learners toward a goal and help them achieve it.

YOU'RE ON THE TEAM!

3. WHAT TO TEACH

Remember that, to the student-learner, your organization is a maze of stock, fixtures, equipment, personnel, customers, and problems. To him, it is all very confusing. He is aware of his inexperience and lack of knowledge.

Your instruction should be tempered with patient understanding. In order to achieve maximum training results, the student-learner should have an opportunity to learn the skills which have been agreed upon in the step-by-step training plan.

FORMS and AGREEMENTS

FORMS AND AGREEMENTS

Keeping an employee informed of the quality of his performance is a vital motivating force. The COE student is doubly interested in his evaluation because it lets him know how his boss thinks he is doing on the job as well as giving him an indication of how much progress he is making toward accomplishing his occupational objective.

To help make this evaluation, the supervisor is asked to complete the evaluation form at least once each grading period throughout the school year. The coordinator will discuss the items rated and the rating itself with the supervisor and will take the rating into consideration to issue a grade to the student-learner for the grading period.

The evaluation form is used to measure the student's general performance on the job and the competencies the employer has agreed to evaluate for the specific grading period. These competencies will be different for each grading period. They will include new competencies agreed on by the coordinator and training supervisor or they may include some of the previously evaluated competencies where the student did not perform well. The coordinator may also ask that you give the student a final evaluation on all competencies again at the end of the year for a final grade.

The supervisor, coordinator, and student-learner benefit from meaningful, periodic evaluations. By objectively taking stock of the COE student's performance, the supervisor reviews performance and gains an insight into the training and job assignments which will stretch the student-learner's capacity and help make him a more productive employee. The coordinator gains information concerning what learning experiences need to be stressed in the classroom, and the student-learner receives a shot in the arm by knowing what the boss thinks of him as well as finding out what he must do to improve.

If the most benefit is to be gained from the evaluation process, the following tips need to be followed:

*Rate student-learner fairly on each characteristic.
*Avoid letting over-all opinions and feelings about the student unduly influence the rating given.
*Always inform the student-learner about the rating and explain how he can improve in the future.
*Avoid rating all characteristics high or low because of a general impression taken from over-all performance.
*Keep the COE student informed of progress made over the previous evaluation.
*Compliment student-learner on good performance and offer specific means for improvement where needed.
*Give student-learner every chance to succeed. Avoid letting poor performance in one instance overshadow success in others.

Minot State College
OFFICE OCCUPATIONS PROGRAM

AGREEMENT

Between Student, Parent, and Training Sponsor

THE STUDENT:

1. Will report promptly and engage in his assignment Monday through Friday, _______ m. to ______ m., from _______ 19 _____, to _______ 19 _____.
2. Will notify the agency well in advance when absence is unavoidable.
3. Will cooperate with the agency supervisor, engage in the assignment as a learning experience, observe business etiquette, and keep safety rules.
4. Will make a weekly written report and an end–of–semester report to the school coordinator.
5. Will carry Student Accident Insurance if in the Exploratory Program.

THE TRAINING SPONSOR:

1. Will direct the observation and participation of the student in the occupational experience as indicated below, with the objective of assisting the student in understanding the nature of the occupation and the responsibilities and opportunities which it involves.
2. Will not allow this student to replace any regular employee.
3. Will keep a daily record of the student's attendance and will report attendance and progress to the school director as requested.
4. Will notify the school director at once of any unsatisfactory development.
5. Will not assign the student to hazardous tasks.
6. Will provide insurance against accident on the premises, when on a paid job and comply with all Federal, State, and Local labor law regulations.

Type of work experience ____________________ Occupational position __________________

Experience to be provided in this position: ____

____

Wage: ________ per hour. Total hours per week – Monday to Friday ________________
(Must be legal minimum wage unless on exploratory program)
Total hours Saturday ______ Sunday ______

THE PARENT:

1. Consents to this assignment and will assist the student in making use of the educational experiences provided.

Signed and accepted: Student ____

Training Sponsor ______________________________

By ______________________________

Date: ____________, 19 ____ Parent ____

Work Agreement: **High School — Cooperative Office Education Program**

Employer: ______________________ Address: ______________________ Phone: __________

Student: ______________________ Address: ______________________ D.O.B. __________

Manager: ______________________ Student Supervisor: ______________________

THE AGREEMENT IS TO DEFINE THE CONDITIONS UNDER WHICH ______________ ______________ IS TO RECEIVE COOPERATIVE OFFICE EDUCATION TRAINING. IT WILL SERVE AS A GUIDE TO ALL COOPERATING PARTIES: THE STUDENT. THE SCHOOL, THE EMPLOYER, AND THE PARENTS.

The School will provide the student with opportunities for training in the basic skills of the occupations and the technical information related to it. It will try to parallel the course of study with the job experience to the extent that the student will receive a basic office education.

The Student agrees to perform diligently the work experiences assigned by the employer according to the company policies and regulations as apply to regular employees. The student also agrees to pursue faithfully the prescribed course of study and to take advantage of every opportunity to improve his efficiency, knowledge, and personal traits. He further agrees to report for work punctually and regularly and will notify the employer or supervisor if he is unable to be present. Should it be necessary for him or her to miss school in the morning, he or she cannot work in the afternoon. He or she will work a minimum of two hours per day but in no case should total hours exceed 20 hours during a regular school week.

The Employer agrees to give the student a variety of office duties that correlate with the training she is receiving in the Secretarial Office Class. He will assign some member of his organization who will have a continuing responsibility for the training and supervision of the student—learner, or he will assume this responsibility himself. As a beginning wage he will compensate the student at $ ________ per hour. Progress and advancement made by the student will be evaluated and discussed by the employer and coordinator throughout the year, and a formal report will be submitted at the end of each semester.

The Parent or Guardian's signature indicates his consent for the student to work and to study in this program. He will encourage the student to effectively carry out his duties and responsibilities, share the responsibility for the conduct of the student, and be responsible for the safety and conduct of the student while she is traveling to and from the school, the training station, and home.

It is further agreed that should this working agreement become unsatisfactory for any party it can be dissolved by notifying the coordinator and allowing her sufficient time to make arrangements for termination.

TRAINING WILL COVER THE PERIOD FROM ________, 19___ to ________, 19___.

EMPLOYER ______________________ STUDENT ______________________

COORDINATOR ______________________ PARENT ______________________

295

______________________ HIGH SCHOOL
MEMORANDUM OF TRAINING PLAN

Date____________, 19____

1. The____________________ will permit ____
(Training Agency) (Student—Learner)
to enter their establishment for the purpose of gaining knowledge and experience as ______________________ (Occupation) upon completion of a six weeks probationary period.

2. The course of training is designed to run for a one—year period with a minimum of ________ hours per week required for the work experiences and at least one period in each school day required for the supervised and directed study of technical and related subjects.

3. The coordinators shall, with the assistance of the employer or someone delegated by him, prepare a schedule of processes to be learned on the job and an outline of related subjects to be taught in school. These items to be made a part of this memorandum.

4. The schedule of compensation to be paid the trainee shall be fixed by the training agency and the coordinator and shall become part of this memorandum, and a record noted on the back of this sheet. Such wages shall be comparable to wages paid apprentices and other employees in the occupation in which the student—learner is engaged. They shall conform to the Fair Labor Standards Act of 1938, if applicable.

5. The student—learner will not be permitted, in the process of gaining occupational experience, to remain in any one operation, job, or phase of the occupation beyond the period of time that is necessary for him to become proficient.

6. The student, while in the process of training, will have the status of student—learner and will not displace a regular worker now employed.

7. All complaints shall be made to and adjusted by the coordinator.

8. The parent or guardian shall be responsible for the personal conduct of the student—learner while in training.

9. The employment of the student—learner shall conform to all Federal, State, and Local labor laws and regulations.

10. The coordinator shall have the authority to transfer or withdraw the student at any time.

______________________________	______________________________
Coordinator	Student
______________________________	______________________________
Employer	Parent or Guardian

STEP-BY-STEP TRAINING PLAN

Student–Learner ______________________________

Address & Telephone Number ______________________________

Training Station ______________________________

Address & Telephone Number ______________________________

Career Objective ______________________________

Job Description ______________________________

____

A. Areas of experience and training

1. Typewriting
2. Dictation and transcription
3. Office machines
4. Telephone techniques
5. Receptionist
6. Filing
7. Office etiquette
8. Public relations
9. Mailroom procedures
10. Office procedures
11. Data Processing
12. Miscellaneous
13. Secretarial rescource books
14. Areas of training and experience not previously included

B. Detail of areas of experience and training

	Planned – Learned		
		Related	
Duties	Trng. Station	Group	Individual
1. Typewriting			
a. Type with accuracy on manual and electric typewriters	______	______	______
b. Type letters from unarranged copy	______	______	______
c. Type other projects from unarranged copy	______	______	______
d. Type carbon copies or multiple copies	______	______	______
e. Type information on blank forms	______	______	______
f. Type tabulations	______	______	______
g. Develop techniques of careful proofreading of all materials	______	______	______

		Related	
Duties	Trng. Station	Group	Individual
h. Type envelopes by chainfeeding methods			
i. Cleaning and maintenance of typewriters			
j. Develop accuracy at a good production rate			
k. Type statistical material			
l. Type ditto masters, stencils, mats			
2. Dictation and transcription			
a. Take and transcribe dictation accurately			
b. Be resourceful in preparing mailable copy			
c. Study files of previous correspondence of firm			
d. Take dictation from various voices			
e. Learn basic theory of touch shorthand and take and transcribe such			
f. Learn how to operate a dictation and transcription machine			
g. Learn particular business terminology			
3. Office machines			
a. Become oriented with various office machines and perform the different math operations			
1. Full keyboard			
2. Ten key			
3. Key driven			
4. Rotary			
5. Electronic			
6. Bookkeeping			
7. Key punch			
8. Mimeograph			
9. Fluid duplicator			
10. Xerox or photo copy			
11. Offset			
12. Other:			
4. Telephone techniques			
a. Answer telephone			
b. Make local calls			
c. Make long–distance calls with complete or little information			
d. Screen calls tactfully			
e. Take complete telephone messages			
f. Operate switchboard			

Duties	Trng. Station	Related	
		Group	Individual
g. Make appointments			
h. Schedule travel arrangements			
i. Use telephone book			
5. Receptionist			
a. Receive callers courteously and graciously			
b. Announce callers in appropriate way			
c. Make appropriate introductions			
d. Make card file of callers to enable recognition			
e. Assist caller when no other person is available			
f. Record appointments			
6. Filing			
a. Learn basic purposes of filing			
b. Learn principles and operate various types of filing systems			
1. Alphabetic			
2. Numeric			
3. Geographic			
4. Subject			
5. Soundex			
c. Use cross reference notations			
d. Get material from file			
e. Classify material to be filed			
f. Clean files and transfer materials periodically to keep material well organized			
7. Office etiquette			
a. Learn office policies and rules			
b. Be tactful			
c. Treat all callers and fellow workers or superiors with respect			
d. Show consideration for others			
e. Use of sense of humor			
f. Be discrete about office matters			
g. Attitude of cooperativeness and dependability			
h. Accept share of responsibility			
i. Keep office matters confidential			
j. Realize the importance of teamwork			
8. Public relations			
a. Deal with customers			
b. Furnish proper information			

Duties	Trng. Station	Related	
		Group	Individual
9. Mailroom procedures			
a. Sort and stamp incoming mail			
b. Use postal meter			
c. Use addressograph			
d. Read, underline, and annotate a letter			
e. Open mail and check for address and enclosures			
f. Use routing and action—required slips			
g. Use various classifications of mail (first class, second class, third class, fourth class, etc.)			
h. Use various mail services (air mail, insured, registered, etc.)			
10. Office procedures			
a. Order supplies			
b. Correct business behavior, dress			
c. Good housekeeping techniques			
d. Swift, accurate ways to handle a variety of office tasks			
e. Maintain a business—like manner			
11. Data Processing			
a. Learn data processing terminology			
b. Perform card—punching processing			
c. Become acquainted with elementary and sophisticated systems of data processing			
12. Miscellaneous			
a. Make bank deposits			
b. Work with financial statements			
c. Arrange meetings and report minutes			
d. Perform bookkeeping tasks			
e. Create various business letter—writing media			
f. Develop charm and personality			
13. Secretarial resource books			
a. Learn where to look for various types of information			
b. Use an atlas			
c. Use 20,000 Words and other dictionaries			
d. Use Hotel Red Book			

300

Duties	Trng. Station	Related Group	Related Individual
e. Use U.S. Postal Manual or Zip Code Directory	______	______	______
f. Use Secretarial Handbook	______	______	______
g. Use periodicals such as Today's Secretary, Business Education World, etc.	______	______	______

14. Areas of training and experience not previously included but would be covered on the job.

C. Projects
   1. Preparation of a personal data brochure
   2. Preparation of an office manual for a beginning employee
   3. Compile a reading list of career objectives, references, and activities

COOPERATIVE EDUCATION

Occupational Outline and Training Plan for the School Year of ______________________

Name ______________________

Date ______________________

Coordinator's Initials ______________________

A. Title of your occupation (See HEW Listing) ______________________

B. HEW Number ______________________

C. Name and address of training station ______________________

____

D. Name of Owner ______________________

E. Name of Supervisor ______________________

F. Name of Trainer ______________________

G. Individual study references available at Training Station and classroom

1. ____________	5. ____________
2. ____________	6. ____________
3. ____________	7. ____________
4. ____________	8. ____________

H. Areas of experience "on–the–job" and training for the school year

1. ____________	4. ____________
2. ____________	5. ____________
3. ____________	6. ____________

I. Detail or outline of "on–the–job" experiences

1. ______________________

   A. ______________________

   B. ______________________

   C. ______________________

302

2. ____

A. ____

B. ____

C. ____

3. ____

A. ____

B. ____

C. ____

4. ____

A. ____

B. ____

C. ____

5. ____

A. ____

B. ____

C. ____

6. ____

A. ____

B. ____

C. ____

7. ____

A. ____

303

B. ____

C. ____

COOPERATIVE OFFICE EDUCATION WORK EXPERIENCE
JOB RATING SHEET

CONFIDENTIAL

Trainee's Name ______________________ Date ______________

Employer ____

EMPLOYER'S EVALUATION OF WORK EXPERIENCE STUDENTS ON THE JOB. Your constructive criticism enables us to provide better instructional training. Please check the following traits as (4) excellent, (3) good, (2) poor, (1) unsatisfactory, omitting any that do not apply to the student–learner in your office.

PERSONAL TRAITS

Grooming	4 3 2 1
Suitability of dress	4 3 2 1
Personal hygiene	4 3 2 1
Speech	4 3 2 1
Interest in work	4 3 2 1
Cooperation	4 3 2 1
Initiative	4 3 2 1
Adaptability	4 3 2 1
Tact	4 3 2 1
Punctuality	4 3 2 1

ABILITY TO:

Follow instructions	4 3 2 1
Take criticism	4 3 2 1
Attend to details	4 3 2 1
Keep on the job	4 3 2 1

SKILL PERFORMANCE

Typing	4 3 2 1
Shorthand	4 3 2 1
Filing	4 3 2 1
Grammar	4 3 2 1
Spelling	4 3 2 1
Punctuation & Capitalization	4 3 2 1
Proofreading	4 3 2 1
Neatness	4 3 2 1
Recordkeeping	4 3 2 1
Office Machines	4 3 2 1

BUSINESS TECHNIQUES

Use of telephone	4 3 2 1
Use of sources of information	4 3 2 1
Office housekeeping	4 3 2 1
Meeting people	4 3 2 1

GENERAL COMMENTS: ______________________________________

____

____

GENERAL RATING OF STUDENTS: ☐ Excellent, ☐ Good, ☐ Fair, ☐ Unsatisfactory

Please list any points that should be emphasized in training:

Rated by ______________________

OFFICE OCCUPATIONS PROGRAM

EVALUATION OF STUDENT-LEARNER

NAME OF STUDENT ____________________ DATE ____________

NAME OF EMPLOYER ______________________________

EMPLOYER'S ADDRESS ______________________________

NAME OF PERSON FILLING OUT THIS FORM ____________________

POSITION ____________ SCHEDULE OF HOURS: FROM ______ TO ______

CHECK THE PHRASE WHICH IS MOST DESCRIPTIVE OF THE EMPLOYEE AND PERFORMANCE.

Do not mark any section that does not apply to job.

1. CONSIDER THIS EMPLOYEE'S DEPENDABILITY IN ASSUMING AND FULFILLING JOB ASSIGNMENT:

		REMARKS
COMPLETELY RELIABLE, REQUIRES MINIMUM DIRECTION	REQUIRES NORMAL SUPERVISION	____________ ____________
REQUIRES CLOSE SUPERVISION	NEEDS DIRECTION AND FREQUENT CHECKING	____________ ____________

2. CONSIDER THIS EMPLOYEE'S JUDGMENT:

FREQUENTLY MAKES INCORRECT DECISIONS	CONSISTENTLY MAKES SOUND DECISIONS	____________ ____________
JUDGMENT SOUND UNDER NORMAL CIRCUMSTANCES	OCCASIONALLY MAKES INCORRECT DECISIONS	____________ ____________

3. CONSIDER THIS EMPLOYEE'S ATTITUDE TOWARD JOB SUPERVISION AND OTHER EMPLOYEES:

		REMARKS
OCCASIONALLY INDIFFERENT AND UNCOOPERATIVE	GENERALLY INTERESTED AND COOPERATIVE	
EXCEPTIONALLY ENTHUSIASTIC AND COOPERATIVE	OFTEN DISINTERESTED AND UNCOOPERATIVE	

4. CONSIDER THE AMOUNT OF EFFORT THIS EMPLOYEE APPLIES TO THE JOB:

STEADY WORKER	FREQUENTLY WASTES TIME	

5. CONSIDER THE EFFECT THIS EMPLOYEE HAS ON OTHERS:

CREATES EXCELLENT IMPRESSION	SOMETIMES CREATES AN UNFAVORABLE IMPRESSION	

6. CONSIDER THIS EMPLOYEE'S ABILITY TO LEARN:

ADEQUATE LEARNING ABILITY	HAS FREQUENT DIFFICULTY IN LEARNING	

7. CONSIDER THE EMPLOYEE'S PERSONAL APPEARANCE

SATISFACTORY FOR TYPE OF JOB	NEEDS IMPROVEMENT	

8. CONSIDER THE ATTENDANCE OF THIS EMPLOYEE:

ALWAYS REGULAR	OCCASIONALLY ABSENT	
SELDOM ABSENT	FREQUENTLY ABSENT	

9. CONSIDER THE QUALITY OF THE WORK PRODUCED BY EMPLOYEE:

CONSISTENTLY BELOW JOB REQUIREMENTS	VERY ACCURATE AND NEAT	____________

10. CONSIDER QUANTITY OF ACCEPTABLE WORK PRODUCED BY EMPLOYEE:

OUTPUT CONSISTENTLY ABOVE REQUIREMENTS OF JOB	MEETS NORMAL PRODUCTION REQUIREMENTS OF JOB	____________
OUTPUT OCCASIONALLY BELOW THE REQUIREMENTS OF JOB	PRODUCTION FREQUENTLY BELOW JOB REQUIREMENTS	____________

OFFICE OCCUPATIONS
MINOT STATE COLLEGE

STUDENT-LEARNER WEEKLY REPORT

Student: ______________________ Training Firm: ______________________

Week Ending: ____

1. What were your activities on the job this week? ______________________

____

2. How did you apply classroom materials to your job? ________________

____

3. What problems came up on which you would like help or class discussion?

____

Weekly Time and Wages Summary				COMMENTS:
Date	*Time Worked*	*Total Hours*		
		Regular	*Over-Time*	
TOTAL HOURS WORKED				
Hourly Rate ________	Wages Earned			

Employer Signature: ______________________________________

Student Signature: ______________________________________

PROGRESS REPORT*

Student/Learner ______________

1. From your observations of the student and work, please check the appropriate spaces:

Quality of Student	Excellent	Very Good	Good	Average	Poor
Punctuality					
Cooperation					
Willingness to work					
Adaptability					
Reliability					
Initiative					
Resourcefulness					
Loyalty					
Obedience to rules					
Judgment					
Tact					
Promise of success					

Personal Traits	Excellent	Very Good	Good	Average	Poor
Personality					
Appearance					
Courtesy					
Speech					
Ambition					

2. Check the points below on which you feel that the student need additional training:

Spelling _____
Penmanship _____
English _____
Arithmetic _____
Bookkeeping _____
Report Making _____
Telephone _____
Personality _____
Neatness in Work _____
Meeting Public _____
Machine Operation _____
Typewriting _____
Filing _____
Shorthand _____
Following Directions _____
Other: ______________

Does the student, in your opinion, have the technical training required to do the type of work expected of him/her? ______________

Name of Firm ______________

Submitted by ______________ Date ______________

Student's Signature ______________

Additional Comments:

Coordinators:

---

*Submitted by Bismarck Junior College, Bismarck, ND.

CHECKLIST FOR EVALUATING
COOPERATIVE PROGRAMS IN
OFFICE EDUCATION

Yes	No	
		Objectives
_____	_____	1. Has a written statement setting forth the philosophy and objectives of the cooperative office skills program been developed?
_____	_____	2. Is the program evaluated periodically in terms of these objectives?
		Advisory Committee
_____	_____	1. Has a general advisory committee made up of local business representatives been appointed to assist the school in the development of the whole business education program?
_____	_____	2. Have the services of this committee or a special advisory committee been utilized in the formulation of the philosophy and objectives of the cooperative office skills program?
_____	_____	3. Is this committee called upon to assist the coordinator in locating suitable training stations for the program?
_____	_____	4. Does this committee meet regularly and function actively?
		Community, School Understanding
_____	_____	1. Has the program been given adequate publicity and promoted aggressively among various community organizations?
_____	_____	2. Have the objectives and philosophy of the program been presented to the entire faculty in an effort to build genuine understanding?
_____	_____	3. Does the school administrator or coordinator review the operation of the program periodically with the entire faculty in an effort to resolve any problems that may have arisen?
_____	_____	4. Are guidance counselors informed as to the place of work experience in the total school program?
_____	_____	5. Does the coordinator discuss the program and its operation in pre–vocational business classes in order that long–range plans may be made by students?
_____	_____	6. Does the coordinator counsel with other business teachers in the school with regard to prospective cooperative students?
_____	_____	7. Are written objectives and operating procedures of the program placed before parents of potential cooperative students?
_____	_____	8. Are students counseled with regard to entering the cooperative office skills program on the basis of their abilities and interests?

Work Stations

Yes	No		
______	______	1.	Do the work stations provide an opportunity for well-organized learning situations?
______	______	2.	Are learning opportunities provided at a majority of the work stations varied in nature?
______	______	3.	Is an effort made to rotate students on those jobs where varied learnings are not possible?
______	______	4.	Does the schedule of the coordinator provide sufficient time to visit these training stations periodically?
______	______	5.	Does the coordinator observe the students while on the job?

Related Instruction

Yes	No		
______	______	1.	Are students encouraged to participate in the evaluation of the instruction and thereby contribute to the progress of the program?
______	______	2.	Is an effort made in the periods of related instruction to present basic background information, skills, and attitudes that are common to all office occupations?
______	______	3.	Does the coordinator endeavor to provide instruction for each student directly related to his specific job situation?
______	______	4.	Are the standards of achievement demanded in the classroom comparable to those of beginning office workers?
______	______	5.	Does the teacher–coordinator have suitable classroom instructional materials?
______	______	6.	Does the classroom laboratory have adequate machine equipment?
______	______	7.	Does the school budget permit periodic addition or replacement of equipment?

Reports

Yes	No		
______	______	1.	Does the coordinator work with the guidance staff in his efforts to secure information about students?
______	______	2.	Does the coordinator have access to, and use, complete student records including tests, grades, attendance and health records, and other available data?
______	______	3.	Have suitable forms been prepared for recording each of the various coordinating activities?
______	______	4.	Does the coordinator prepare a record of his daily coordination activities?
______	______	5.	Is this report presented weekly or monthly to his school principal and superintendent?
______	______	6.	Is the coordinator able to maintain some type of weekly record for each student which is in sufficient detail that it can be used for individual conferences with the student?
______	______	7.	Is the student accomplishment on the job evaluated periodically by the employer?
______	______	8.	Has the coordinator prepared an evaluative device to be used by employers in their appraisal of students under their jurisdiction?

Yes No

______ ______ 9. Are these employer reports used as a basis for classroom instruction and conferences?

______ ______ 10. Is an accomplishment report submitted at least quarterly to the school administration for review?

Follow–up Activities

______ ______ 1. Does the coordinator have an organized program of follow–up of former cooperative students?

______ ______ 2. Are records of these former students kept up to date?

______ ______ 3. Are former cooperative students encouraged to counsel with the coordinator?

______ ______ 4. Is the cooperative program adjusted to the findings of the follow–up program?

______ ______ 5. Are these findings recorded and reported to the school administrator, the faculty and the advisory committee?

Public Relations

______ ______ 1. Is the cooperative program periodically publicized in school publicity media?

______ ______ 2. Is a planned program of publicity carried on within the school for the benefit of the members of the faculty?

______ ______ 3. Is the cooperative program periodically publicized in local publicity media?

______ ______ 4. Does the school administrator check the effectiveness of the program with each of the following:

_____Business Representatives?
_____Faculty Members?
_____Community Groups?
_____Pupils?

______ ______ 5. Does the school administrator occasionally accompany the coordinator on his visits?

Legal Requirements

______ ______ 1. Are all students participating in the actual work experience phase 16 years of age or over?

______ ______ 2. Are students employed an average of 15 hours a week during the school year?

______ ______ 3. Is the program under supervision by the coordinator at all times when the hours reported above are counted?

______ ______ 4. Are students being paid for their work?

Yes	No		
______	______	5.	Is the amount of time devoted to related instruction in accordance with State regulations?
______	______	6.	Are a majority of the students in the cooperative class employed?

Taken from Checklist For Evaluating Cooperative Part–Time Programs in Office Education. Bureaus of Business and Distributive Education, The University of New York, New York, 1969.

GLOSSARY

314

Competency--the knowledge, skill and/or attitude needed for the student trainee to perform successfully on the job.

Cooperative Office Education--a program designed to prepare people for occupations in the area of business.

FBLA--the local, state and national student organization which is an important part of the total Office Education program.

Evaluation Form--a form used by the teacher/coordinator and training supervisor to assess the student-learner's progress in becoming a competent employee.

Occupational Objective--the student has set a vocational goal involving the development of competencies needed for success in some area of business.

Student-Learner--title frequently used when referring to COE student's status on the job.

Training Agreement--a form outlining some of the specific commitments made by the students, as well as those responsible for his training. It is signed by the training supervisor, coordinator, student, and parents. It is legally non-binding.

Training Plan--a map jointly developed by the coordinator, student, and training supervisor which outlines the competencies that the student is required to master during his time of employment.

Training Supervisor--the individual at the training station who is directly responsible for teaching and evaluating the student-learner. This may be the employer, a supervisor or some capable regular employee who has been so designated.

Training Station--the business firm at which the student is employed as part of the Cooperative Office Education program.

Teacher/Coordinator--person who manages the Office Education program. Commonly referred to as the "coordinator".

APPENDIX B

JOB DESCRIPTIONS AND INDVIDUALIZED TRAINING PLANS* PAGE

1. Bookkeeper (Accounting Clerk). 275
2. Cashier. 285
3. Bank Clerk (Teller) 287
4. File Clerk 290
5. General Office Clerk 302
6. Transcribing Machine Operator 313
7. Mail Clerk 315
8. Receptionist 321
9. Secretary 324
10. Legal Secretary 336
11. Medical Secretary 347
12. Stenographer 357
13. Clerk-Typist 359
14. Key-Punch Operator 366

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*Division of Vocational Education, State Department of Education, Training Plans for Cooperative Office Education, Richmond, Virginia (August, 1974), pp. 44-91.

BOOKKEEPER (Accounting Clerk) 14.0102

Job Description: Keeps records of financial transactions of establishment. Verifies and enters details of transactions as they occur or in chronological order in account and cash journals from items such as sales slips, invoices, check stubs, inventory records, and requisitions. Summarizes details on separate ledgers, using adding machine, and transfers data to general ledger. Balances books and compiles reports to show statistics, such as cash receipts and expenditures, accounts payable and receivable, profit and loss, and other items pertinent to operation of business. Calculates employee wages from plant records to timecards and makes up checks or withdraws cash from bank for payment of wages. May prepare withholding, Social Security, and other tax reports. May compute, type, and mail monthly statements to customers. May complete books to or through trial balance. May operate calculating and bookkeeping machines.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives a brief overview of the company--its organization, role in the business community, products made or services rendered, types of clients or customers served.
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.
4. Receives information regarding job efficiency--following directions, asking questions, following standard company practices, producing work on time, maintaining high standards, checking facts and figures.
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.
6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.
7. Receives explanation of work flow within the office and the importance of the student's job to total office output.
8. Meets supervisory personnel and office staff.

Journalizing:

1. Verifies source documents.
2. Analyzes transactions.
3. Journalizes transactions in:
    a. general journal
    b. purchases journal
    c. sales journal
    d. cash receipts journal
    e. cash payments journal
4. Makes adjusting and closing entries.

Posting:

1. Posts transactions to ledger accounts in:
    a. general ledger
    b. accounts receivable ledger
    c. accounts payable ledger

317

2. Prepares trial balance.
3. Posts adjusting and closing entries to ledger accounts.
4. Closes and balances ledgers.

Financial Reports:

1. Prepares income statement.
2. Prepares balance sheet.
3. Types or duplicates statements for distribution.

Payroll:

1. Computes time cards.
2. Prepares payroll register.
3. Types payroll checks.
4. Prepares voucher check.
5. Enters payroll expense, employee taxes payable, and employee deductions payable in general journal.
6. Computes employer F.I.C.A. tax, federal unemployment tax, state unemployement tax, and enters in general journal.
7. Posts payroll entries to ledger accounts.
8. Posts payroll register to employees' earnings records.
9. Reconciles payroll records at end of each pay period.

Bank Reconciliation:

1. Prepares outstanding checks list.
2. Prepares deposits in-transit list.
3. Prepares reconciliation between bank balance and check book balance.
4. Files canceled checks, outstanding checks list, and reconciliation of bank statement.

Petty Cash Fund:

1. Prepares petty cash vouchers and disburses cash.
2. Journalizes vouchers in petty cash disbursements record.
3. Foots and balances record at end of accounting period.
4. Prepares petty cash statements.
5. Writes checks to replenish petty cash fund.
6. Files vouchers and summary reports.

Office Machines Operation:

1. Uses adding machines and calculators to determine totals, discounts, taxes, receipts, disbursements, etc.
2. Operates bookkeeping machine.
3. Operates check writer.

Filing:

1. Receives explanation of structure and use of filing systems in office.
2. Files incoming correspondence.
3. Files copies of outgoing correspondence.
4. Files source documents and supporting papers, invoices, bills, receipts, lists, orders, checks, statistical data, etc.
5. Retrieves materials and information from files.

Office Communications:

1. Handles customer inquiries about statements and bills.
2. Takes and records telephone messages.
3. Types routine correspondence, interoffice memorandums, financial reports, and statistical reports.
4. Maintains typewriter by cleaning and changing ribbon.

INDIVIDUALIZED TRAINING PLAN

Copy: ______

Name ______________________ Job Title Accounting Clerk

Firm ______________________ Training Sponsor ______________________

Student's Career Objective ______________________

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Receives explanation of company policies.				
2. Receives explanation of importance of loyalty, dependability, cooperation, grooming, and high production level.				Developed by Phyllis D. Boothe, Varina High School, Richmond, VA
3. Receives explanation of structure of the department.				
4. Receives explanation of duties to be performed.				
5. Meets fellow workers.				
ADDITIONS AS TRAINING REQUIRES				
Accounting:				
1. Purchases certain material.				
2. Writes purchase orders.				

320

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
3. Approves purchase orders.				
4. Distributes copies of purchase orders.				
5. Records green copies of purchase orders on control sheets.				
6. Sends bills for approval.				
7. Makes purchases reports.				
8. Sends purchases reports to managers.				
9. Prepares accounts payable vouchers.				
10. Prepares manual check vouchers.				
11. Issues purchase order numbers.				
ADDITIONS AS TRAINING REQUIRES				
Recordkeeping:				
1. Records vendor names for accounts payable.				
2. Keeps record of each purchase order written.				

321

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
3. Keeps record of each vendor name and number. ADDITIONS AS TRAINING REQUIRES				
Routine Clerical: 1. Proofreads forms. 2. Prepares coffee. 3. Runs errands. 4. Folds letters and stuffs envelopes. ADDITIONS AS TRAINING REQUIRES				
Typewriting: 1. Types checks, offset masters, letters, envelopes, cards for rotary files, and other business forms. ADDITIONS AS TRAINING REQUIRES				
Telephone: 1. Answers telephone and takes messages for President.				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
2. Answers telephone and takes messages for sales office.				
3. Answers general questions from telephone callers.				
ADDITIONS AS TRAINING REQUIRES				
Filing:				
1. Files material in central files.				
2. Files check register copy of checks.				
3. Files file copy of checks.				
4. Files dead purchase orders.				
5. Files live purchase orders.				
6. Files invoices, paid bills, and other forms.				
7. Retrieves information from files.				
ADDITIONS AS TRAINING REQUIRES				

323

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Duplicating Processes:				
1. Receives materials to be duplicated.				
2. Consults with person requesting service.				
3. Obtains supplies needed.				
4. Duplicates material on multilith machine.				
5. Staples material when needed.				
6. Delivers materials.				
7. Stores material for later use.				
8. Makes copies on copy machine.				
9. Cleans multilith machine.				
10. Puts toner and paper in copy machine.				
ADDITIONS AS TRAINING REQUIRES				
Mail Operations:				
1. Stamps mail received.				
2. Distributes mail.				
3. Runs outgoing mail through postage meter.			324	

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Duplicating Processes:				
4. Sends registered mail and return receipt requested mail.				
5. Checks for postage due.				
6. Sorts mail by: 1. Local 2. Air Mail 3. Out of Town 4. Out of State				
7. Determines rates by weighing mail.				
8. Keeps record of ascending and descending register.				
9. Takes out personal mail without stamps.				
10. Takes mail to post office.				
ADDITIONS AS TRAINING REQUIRES				
Receptionist Duties:				
1. Mans switchboard on Monday and Friday.				
2. Makes long-distance and local calls.				
3. Takes telephone messages.				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
4. Answers questions from callers. 5. Reroutes phone calls. ADDITIONS AS TRAINING REQUIRES				
Inventory: 1. Checks supplies in cabinet and replenishes when necessary. 2. Checks supplies for duplicating machines replenishes when necessary. 3. Checks supply of company envelopes and stationery and replenishes when necessary. ADDITIONS AS TRAINING REQUIRES				

CASHIER

14.0103

Job Description: Receives funds from customers and employees, disburses funds, and records monetary transactions incidental to conduct of business. Counts money to verify amounts and issues receipts for funds received. Compares totals on cash register with amount of currency in register to verify balances. Endorses checks and lists and totals cash and checks for bank deposit. Prepares bank deposit slips. Posts data to accounts and balances receipts and disbursements. Compiles collection, disbursement, and bank-reconiliation reports. Operates office machines, such as typewriter, calculating and bookkeeping machines.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives a brief overview of the company--its organization, role in the business community, products made or services rendered, types of clients or customers served.
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.
4. Receives information regarding job efficiency--following directions, asking questions, following standard company practices, producing work on time, maintaining high standards, checking facts and figures.
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.
6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.
7. Receives explanation of work flow within the office and the importance of the student's job to total office output.
8. Meets supervisory personnel and office staff.

Cashier Duties

1. Obtains cash box and verifies daily balance sheet.
2. Verifies amounts and issues receipts for customer payments.
3. Figures customer discounts when applicable.
4. Records customer payments in Cash Receipts Journal.
5. Posts payments made by mail and prepares receipts.
6. Stamps or endorses checks for bank deposit.
7. Counts day's receipts for bank deposit.
8. Prepares bank deposit slips.
9. Records bank deposit in Cash Receipts Journal and Cash Payments Journal.
10. Reconciles monthly bank statment with company checking account records.

Cash Register Duties

1. Operates cash register.
    a. makes change
    b. uses identification keys
    c. develops reasonable speed and operating efficiency

327

2. Counts currency.
   a. wraps coins if required
   b. clips or bands currency if required
3. Compares totals on cash register with amount of currency in register to verify balances.
4. Prepares cash slips or deposit tickets.
5. Makes bank deposits or places monies in company safe.
6. Prepares daily cash report.

Petty Cash Fund

1. Prepares petty cash vouchers.
2. Pays petty cash bills.
3. Posts vouchers to petty cash book.
4. Prepares petty cash statements.
5. Replenishes petty cash fund.
6. Files vouchers and summary reports.

Office Machine Operation

1. Uses adding machines and calculators to determine totals, discounts, taxes, receipts, disbursements, etc.
2. Operates bookkeeping machine.
3. Operates check writer.
4. Operates ticket-dispensing machine.

Filing

1. Receives explanation of structure and use of filing systems in office.
2. Files incoming correspondence.
3. Files copies of outgoing correspondence.
4. Files source documents and supporting papers, invoices, bills, receipts, lists, orders, checks, statistical data, etc.

Office Communications

1. Handles customer inquiries about statements and bills.
2. Takes and records telephone messages.
3. Types routine correspondence, interoffice memorandums, financial reports, and statistical reports.
4. Maintains typewriter by cleaning and changing ribbon.

BANK CLERK (Teller) 14.0105

Job Description: Receives and pays out money, and keeps records of money and negotiable instruments involved in various bank transactions, performing any combination of the following tasks: Receives checks and cash for deposit, verifies amounts, and examines checks for endorsements. Enters deposits in depositors' passbook or issues receipts. Cashes checks and pays out money upon verification of signatures and customer balances. Places holds on accounts for uncollected funds. Orders supply of cash to meet daily needs, counts incoming cash, and prepares cash for shipment. May compute service charges, file checks, and accept utility bill payments. May photograph records, using microfilming device. May operate various office machines. May sell domestic exchanges, travelers checks, and savings bonds. May open new accounts, and compute interest and discounts.

EXPERIENCES AND TRAINING NEEDED

Job Orientation

1. Receives a brief overview of the bank--its organization, role in the business community, services rendered, types of customers or clients served.

2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).

3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.

4. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.

5. Receives information regarding job efficiency--following directions, asking questions, following standard bank practices, producing work on time, maintaining high standards, checking facts and figures.

6. Receives information about correct bank image--dress, grooming, voice, posture, quality of work.

7. Receives explanation of work flow within the bank and the importance of the student's job to total bank output.

8. Meets supervisory personnel and bank staff.

Handling Cash

1. Uses a standard procedure for counting and handling cash.

2. Orders, ships, and accounts for currency and coin received from, or shipped to, Federal Reserve or correspondent bank.

329

3. Protects cash, making certain usually large cash deposits are placed in vault immediately.

4. Receives money in exchange for what is paid out in transactions involving exchange of coin for currency, or vice versa.

5. Takes out of circulation and redeems badly worn, bent, or damaged coins and currency.

6. Verifies wrapped coins and currency.

7. Identifies counterfeit bills and coins.

Opening and Closing Checking Accounts

1. Opens checking accounts, following procedures used by bank.

2. Closes checking accounts, following procedures used by bank.

3. Refers the closing of a deceased person's account to an officer of the bank.

Operating Teller Station

1. Secures cash to open each day.

2. Handles debits, credits properly.

3. Uses available machines--including computer terminal--during operation.

4. Balances take-in cash and paid-out to prove work.

5. Prepares required proof sheets and other reports at end of day.

6. Prepares cash for daily pick-up.

Paying and Receiving

1. Issues and receives currency and checks using proper paying/receiving procedures.

2. Handles stop payments and overdrafts.

3. Handles postal money orders.

4. Handles checks:
    a. certified
    b. corporation
    c. foreign
    d. traveler's
    e. checks on other banks

   f. checks returned unpaid
   g. checks to order of own bank
   h. stale
   i. checks signed by persons who have died
   j. checks drawn on fiduciary accounts

5. Receives explanation of commonly used methods of "kiting."

6. Determines that powers of attorney are in bank's files before cashing checks signed by people who claim to have such powers.

7. Handles deposits:
   a. deposits to checking and savings accounts
   b. deposits accepted after banking hours
   c. checks offered by a customer in which only a part is to be deposited

Savings Accounts

1. Opens and closes savings accounts, following procedures used by bank.
   a. joint savings
   b. individual savings
   c. minor ownership of account
   d. Christmas savings
   e. school and club savings

2. Computes interest on deposits and explains to customers.

3. Corrects errors in accordance with bank's policy.

4. "Flags" ledger and signature card immediately upon receiving notification of a lost passbook.

5. Handles savings account withdrawals.

Safe Deposit Operations

1. Grants customers access to boxes.

2. Maintains rent payment card files.

3. Refers to an officer, for decision, all matters arising with respect to safe deposit box in the event of death, insanity, or bankruptcy of the box renter.

4. Informs customers concerning keys to boxes.

5. Rents boxes, following bank's internal procedures.

FILE CLERK

14.0302

Job Description: Files correspondence, cards, invoices, receipts, and other records in alphabetical or numerical order, or according to subject matter, phonetic spelling, or other system. Places material in file cabinet, drawers, boxes, or in special filing cases. Locates and removes material from files when requested. Keeps records of material removed, stamps material received, traces missing file folders, and types indexing information on folders. May enter data on records. Classifies material when classification is not readily discernible. Disposes of obsolete files in accordance with established retirement schedule or legal requirements. May operate keypunch to enter data on tabulating cards. May type reports. May use calculating machine.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives a brief overview of the company--its organization, role in the business community, products made or services rendered, types of clients or customers served.
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.
4. Receives information regarding job efficiency--following directions, asking questions, following standard company practices producing work on time, maintaining high standards, checking facts and figures.
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.
6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.
7. Receives explanation of work flow within the office and the importance of the student's job to total office output.
8. Meets supervisory personnel and office staff.

Records Management:

1. Receives instruction on specific filing system used in office--card system, vertical files, visible system, power system.
2. Receives instruction on special files such as punched card system, computer tape file, microfilms, microfiche, microform if they are used.
3. Examines the files with the supervisor and receives explanation of stamping, coding, and release marks.
4. Inspects and codes letters in incoming mail and has them checked by the supervisor.
5. Files incoming and outgoing correspondence and documents under supervision.
6. Examines the card files to observe typing placement and information recorded.
7. Types sample file cards and has them checked by the supervisor.
8. Types cards for the card file.

332

9. Receives instruction in cross referencing.
10. Cross references cards and copies of incoming correspondence and has the work approved.
11. Types file folder labels.
12. Receives explanation of the order in which work should be completed.

Information Retrieval:

1. Retrieves material from files when it is requested.
2. Receives instruction in the use of copying equipment and circumstances under which copies are made.
3. Copies correspondence, documents, and other material as needed.
4. Supplies written information from file data.
5. Operates automatic information retrieval system, if available.

Charge and Follow-Up Procedures:

1. Charges out material using:
    a. guides
    b. out folders
    c. substitution cards
2. Keeps tickler of follow-up file.
3. Retrieves material from borrower when it has been out beyond period allowed.

File Searches:

1. Receives instruction on where and how to locate missing records.
2. Conducts searches for missing records.
3. Records what data can be recalled if materials are known to be lost and places sheets in file in lieu of missing materials to prevent further searches.

Records Retention and Disposal:

1. Receives instruction of transfer, storage, and disposal of records.
2. Uses records retention schedules.
3. Transfers material to storage or inactive files.
4. Records inactive papers by microfilming.

Records Protection:

1. Identifies vital records and stores them in appropriate locations.
2. Makes facsimile or microfilm copies of vital records to be stored in another location.

Additional Duties:

1. Maintains various files as requested.
    a. hold
    b. pending
    c. open
    d. closed
    e. expiration
2. Orders filing supplies.
3. Revises and up-dates files.
4. Replaces worn file folders, guides, and labels.
5. Distributes requested materials to departments.
6. Enters data on records.

333

INDIVIDUALIZED TRAINING PLAN

Copy: ________

Name ______________________ Job Title File Clerk

Firm ______________________ Training Sponsor ______________________

Student's Career Objective ______________________

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INSTRUCTION RELATED INSTRUCTION
Job Orientation:				
1. Receives a brief overview of the clinic and the types of medical services it renders to the community.				
2. Receives instruction about the basic confidentiality of the materials and information contained in the medical folders.				
3. Receives basic salary information payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).				
4. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.				
5. Receives information regarding job efficiency--following directions, asking questions, following standard company practices, completing work on				

Developed by Rubie Lee Johnson, James Monroe High School Fredericksburg, VA

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
time, maintaining high standards, checking facts, figures, and completion of records.				
7. Receives information about correct company image--dress, grooming, voice, posture, quality of work.				
8. Receives explanation of work flow within the medical records department and the Clinic and the importance of the student's job to the total Clinic's efficiency.				
9. Meets supervisory personnel and office staff.				
10. Receives instruction in telephone usage, which is mostly inter-clinic.				
ADDITIONS AS TRAINING REQUIRES				
Records Management: 1. Receives instruction on specific filing system used in the Clinic alphabetic card file and color-coded vertical shelf files using the Terminal Digit numerical system.				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
2. Examines the files with the supervisor and receives explanation of the numbering system.				
3. Receives instruction in finding numbers of patients in card file and numbering material for patients' records (charts).				
4. Observes experienced file clerk as she/he numbers papers.				
5. Numbers papers which need numbering--hospital papers, X-rays, EKG's, biopsies, tissue reports, Emergency Room sheets.				
6. Receives instruction about the order in which papers should be placed in individual patient's folders (charts).				
7. Arranges papers in folder and has work inspected by the supervisor.				
8. Receives instruction on assigning numbers to new patients.				
9. Writes information for new patients on sample 3 x 5 card and has work approved by supervisor.				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
10. Prepares cards for the card file.				
11. Receives instruction on cross referencing.				
12. Cross references cards and has the work approved.				
13. Receives a list of the codes which indicate that no chart has been prepared for the patient.				
14. Receives explanation of codes recorded on 3 x 5 alphabetic patient cards.				
15. Receives instruction on preparation of new patient's chart.				
16. Receives explanation of the order in which work should be completed (priorities).				
17. Receives instruction about locations of doctors' offices.				
18. Receives instruction about the use of green "Out" sheets or cards.				
a. Dr. Matson and Surgery Dept. use green sheets to record appointments of patients.				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
b. Other departments use an appointment book; then the page is copied and sent to Medical Records Dept. and the file clerk copies the name of the patient on the green "Out" sheet.				
c. File clerk looks up and pulls charts.				
d. Green "Out" sheet is placed on file shelf in place of the patient's chart.				
e. File clerk removes green "Out" sheet when the chart is returned to the shelf.				
f. File clerk scratches appointment from green sheet and returns sheet to pile on the counter.				
19. Receives instructions in entering patient's file number on bills from doctors for patients come to Medical Records where the file clerk enters the patients number				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
whether it is a new or old patient. The file clerk then puts the bills in the dumb waiter or other designated place for the receptionist to pick up.				
20. Receives instruction about where to place charts when they are returned to the department.				
21. Collects charts from the receptionists' stations at the end of the day.				
22. Sorts charts and puts them in numerical order.				
23. Files charts at the end of the day.				
24. Pulls out green "Out" cards and scratches names from the cards.				
25. Places cards on counter for future use.				
ADDITIONS AS TRAINING REQUIRES				
Information Retrieval: 1. Receives instruction in retrieving charts from the shelves and substituting green "Out" sheets.				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
2. Retrieves charts from files as they are requested and puts "Out" cards in place of the chart, with the aid of the supervisor.				
3. Prepares charts for patients who have appointments with each doctor. a. Appointment sheets are sent down to the department in advance. File clerk puts numbers on appointment sheets if the numbers are missing. b. Writes appointments on green sheets. c. Sorts green sheets in numerical order. d. Pulls charts. e. Sees that everything is in proper order in the folder. f. Stamps date for which the charts have been pulled. g. Stuffs charge tickets in the charts.				
4. Receives instructions about where to put charts for the receptionists to pick them up (window, file cabinet, top of refrigerator, dumb waiter).				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
5. Distributes the charts as directed by the supervisor. 6. Receives instruction in the use of copying equipment and circumstances under which copies are made. 7. Copies correspondence, documents, and other material as needed. ADDITIONS AS TRAINING REQUIRES				
Charge and Follow Up: 1. Receives instruction in taking green "Out" sheets, appointment sheets, and charge sheets from dumb waiter and numbering them. 2. Numbers several papers with the aid of the supervisor. 3. Charges out patient charts, using green "Out" sheets. 4. Retrieves materials from borrower when it has been out beyond period allowed and when it is needed by another doctor. ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
File Searches: 1. Receives instruction on where and how to locate missing records. 2. Conducts searches for missing records. 3. Records what data can be recalled if materials are known to be lost and places sheets in file in lieu of missing materials to prevent further searches. ADDITIONS AS TRAINING REQUIRES				
Records Retention and Disposal: 1. Receives instruction on transfer, storage, and disposal of records. (At present, the Clinic never destroys a record. If material should be disposed of, it would be buried or burned.) ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Records Protection: 1. Identifies vital records and stores them in appropriate locations. ADDITIONS AS TRAINING REQUIRES				
Additional Duties: 1. Maintains various files as requested: a. hold b. pending c. open d. expiration--move records to expired file. 2. Orders filing supplies. 3. Revises and updates files. 4. Replaces worn file folders, guides, and labels. 5. Distributes requested materials to departments. ADDITIONS AS TRAINING REQUIRES				

Job Description: Performs any combination of following and similar clerical tasks not requiring knowledge of systems or procedures: writes or types bills, statements, receipts, checks or other documents, copying information from one record to another; proofreads records or forms; counts, weighs, or measures materials; sorts and files records, receives money from customers and deposits money in bank; addresses envelopes or packages by hand or with typewriter or addressograph machine; stuffs envelopes by hand or with machine; answers phone, conveys messages and runs errands; stamps, sorts, and distributes mail; stamps or numbers forms by hand or machine; operates office duplicating equipment.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives a brief overview of the company--its organization, role in the business community, products made or services rendered, types of clients or customers served.

2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).

3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.

4. Receives information regarding job efficiency--following directions, asking questions, following standard company practices, producing work on time, maintaining high standards, checking facts and figures.

5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.

6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.

7. Receives explanation of work flow within the office and the importance of the student's job to total office output.

8. Meets supervisory personnel and office staff.

Receptionist:

1. Greets visitors.

2. Refers callers to appropriate person or makes appointments for them.

3. Handles inquiries or requests whenever appropriate.

4. Keeps appointment records.

Typewriting:

1. Types form letters, memoranda, envelopes, cards, and labels.
2. Types letters and reports from rough drafts and corrected copies.
3. Types business forms--orders, bills, checks, telegrams, lists, statements, inventory cards.
4. Types stencils, masters, and offset mats.
5. Cleans and maintains typewriter--includes changing of carbon and fabric ribbons.

Duplicating:

1. Operates duplicating and/or photocopy equipment.
2. Stores, files, or disposes of masters, stencils, and offset mats as directed.

Filing:

1. Receives explanation of structure and use of filing systems in the office.
2. Reads, codes, and sorts material to be filed.
3. Files:
    a. incoming correspondence, orders, invoices, price lists, and other material
    b. copies of outgoing correspondence
4. Prepares new file folders when instructed to do so.
5. Maintains records of materials removed from files.
6. Traces missing file data.
7. Destroys obsolete file materials or transfers them to inactive storage when instructed to do so.
8. Replaces worn folders, labels, and index cards.

Handling Mail:

1. Handles incoming mail:
    a. time stamps, sorts, and distributes
    b. replies to routine mail as directed
2. Prepares outgoing mail:
    a. collects outgoing mail
    b. addresses envelopes and packages by typing, handwriting, or using addressograph machine
    c. stuffs envelopes by hand or with machine
    d. wraps packages
    e. computes and affixes postage manually or with postage meter
    f. keeps record of postage used
    g. batches mail to be sent to post office

Telephone:

1. Place local and long distance calls.
2. Records and delivers telephone messages.
3. Routes calls to persons within the organization.
4. Secures information via telephone.
5. Takes orders for merchandise or services.
6. Answers telephone inquiries.
7. Handles complaints via telephone.
8. Relieves switchboard operator.

Recordkeeping:

1. Receives and posts customer payments.
2. Writes receipts for cash payments or when requested by customers.
3. Keeps customers accounts up to date and accurate.
4. Prepares monthly reports for accounting department.
5. Prepares bank deposits.
6. Reconciles bank statements.
7. Tabulates and/or posts data in record books.
8. Prepares the payroll.
9. Administers petty cash fund.
10. Prepares stock inventory.

Supplies Distribution:

1. Receives, unpacks, and sorts incoming supplies.
2. Counts, measures, weighs, and verifies supplies.
3. Stores supplies.
4. Orders supplies to replenish.
5. Distributes supplies.

346

Office Machines Operation:

1. Operates the following machines:
    a. adding and calculating machines
    b. duplicating and photocopy machines
    c. electric typewriter
    d. electric paper shredder
    e. electric stapler
    f. electric letter opener
    g. addressograph machine
    h. envelope stuffing machine
    i. postage machine
    j. bokkeeping machine

2. Uses intercom and multi-line telephone

INDIVIDUALIZED TRAINING PLAN

Copy: ____________

Name ______________________________ Job Title General Office Clerk

Firm ______________________________ Training Sponsor ____________________

Student's Career Objective ______________________________________

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Receives brief overview of store organization, role in community, products sold, types of customers served.				
2. Receives basic salary information payroll period, computation of pay, taxes withheld, payroll deductions.				Developed by Revere A. Houck, Culpeper County High School, Culpeper, VA
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.				
4. Receives information regarding job efficiency--following directions, asking questions, folowing store practices, producing work on time, maintaining high standards, checking facts and figures.				
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness,				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
pleasantness, sincerity, and loyalty.				
6. Receives information about correct store image--dress grooming, voice, posture, quality of work.				
7. Receives explanation of work flow within the office and the importance of the student's job to total office and store output.				
8. Meets supervisory personnel and office and store staff.				
ADDITIONS AS TRAINING REQUIRES				
Typewriting:				
1. Typewrites letters and memos for the manager and assistant managers.				
2. Typewrites names and company numbers on time cards and payroll envelopes.				
3. Cleans and maintains typewriter.				
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Handling Mail:				
1. Handles incoming mail:				
a. time and store stamps, sorts, and distributes				
b. replies to routine mail				
2. Prepares outgoing mail:				
a. collects outgoing mail				
b. addresses envelopes and packages by typewriting or handwriting.				
c. stuffs envelopes by hand				
d. wraps packages				
e. computes and affixes postage manually				
ADDITIONS AS TRAINING REQUIRES				
Office Housekeeping:				
1. Sweeps and dusts the office.				
2. Keeps office neat and in order.				
3. Locks the safe and closes the office at the end of the day.				
4. Rings the bell for lunch, dinner, and closing time.				
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Receptionist:				
1. Greets visitors.				
2. Refers callers to appropriate persons or makes appointments for them.				
3. Handles inquiries or requests when appropriate.				
ADDITIONS AS TRAINING REQUIRES				
Telephone:				
1. Places local and long distance calls.				
2. Records and delivers telephone messages.				
3. Routes calls to persons with-in store.				
4. Takes orders for merchandise.				
5. Informs customers when special orders arrive.				
6. Secures and gives information by phone.				
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Filing:				
1. Receives explanation of structure and use of filing systems in the office.				
2. Inspects, indexes, codes, sorts, and stores layaways.				
3. Files new listings in the stock books.				
4. Files incoming correspondence, orders, invoices, price lists, and other material and copies of outgoing records.				
ADDITIONS AS TRAINING REQUIRES				
Recordkeeping:				
1. Records employees' cash and charge purchases and balances accounts weekly.				
2. Records customers' layaways and payments on them.				
3. Records items that are lost in the store and later claimed.				
4. Records price list changes and corrections.				
5. Records markups and markdowns on merchandise.				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
6. Records direct orders and warehouse orders.				
7. Records freight bills at the end of each day.				
8. Records sales to organizations that get 10% discounts--for example, school groups.				
ADDITIONS AS TRAINING REQUIRES				
Handling Cash:				
1. Takes the change call or changes large bills for the cashier.				
2. Cashes checks for customers and employees.				
3. Serves as substitute cashier.				
4. Balances the standard register.				
5. Balances the transfer desk records.				
6. Balances the employees' purchases register.				
7. Takes lifts--takes money from all cash registers in the store, counts, and records it.				
8. Makes bank deposit.				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
9. Pays the truckers for freight.				
10. Orders store supplies.				
11. Balances the markup and markdown book each month.				
12. Takes care of store payroll and keeps personnel records.				
ADDITIONS AS TRAINING REQUIRES				

TRANSCRIBING MACHINE OPERATOR

14.0399

Job Description: Transcribes dictation (letters, reports, and other data) from transcription (voice reproducing) machine and typewriter. Operates transcription machine by putting record, belt, or tape on the machine and setting needle or other threading device at the beginning of the dictation. The operator then turns dials to regulate the volume, tone, and speed of voice reproduction and types the message heard through the earphone. Other duties may include typing from written copy, supplying unrecorded information such as name, address, and date, and transferring information from one form to another. May have to file, answer the telephone, be the receptionist (receive and route callers) or stamp and distribute the mail depending on the size and organization of a given office.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives a brief overview of the company--its organization, role in the business community, products made or services rendered, types of clients or customers served.
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.
4. Receives information regarding job efficiency--following directions, asking questions, following standard company practices, producing work on time, maintaining high standards, checking facts and figures.
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.
6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.
7. Receives explanation of work flow within the office and the importance of the student's job to total office output.
8. Meets supervisory personnel and office staff.

Transcribing Machine Operation:

1. Receives instruction on the operation of the transcribing machine that will be used.
2. Listens to and transcribes belts, discs, or records from files in order to become accustomed to machine.
3. Reviews office style manual or handbook for:
    a. letter styles
    b. letter placement
    c. special notations
    d. punctuation styles
4. Receives instruction on how to set work priorities according to:
    a. rush orders
    b. revisions
    c. routine--first come, first served
5. Transcribes from following classifications:
    a. original dictation from belt--letters, memorandums, telegrams, narrative reports, preliminary reports

- b. recorded material--form letters, stored paragraphs, letter format, proposal format
- c. special request--statistical reports, meeting agendas, flowcharts, report updates

6. Edits all work before handing to supervisor.
7. Revises work as requested.
8. Makes carbon copy of all routine work.
9. Obtains needed information from files--account numbers, names and addresses, ZIP codes.
10. Cleans and maintains transcribing machine.

Other Typewriting Duties:
1. Types letters and reports from rough drafts and corrected copies.
2. Types business forms--orders, bills, checks, telegrams, lists, statements, inventory cards.
3. Types stencils, masters, and offset mats.
4. Cleans and maintains typewriter--includes changing of carbon and fabric ribbons.

Filing:
1. Receives explanation of structure and use of filing systems in the office.
2. Files magnetic belts, discs, or records.
3. Files carbon copies of letters and other types of information requiring a carbon copy.
4. Secures information as needed for transcription from files.

Receptionist:
1. Greets and receives office callers while employer is away if nobody else is in office.
2. Answers telephone.
3. Secures information by telephone necessary for transcription.
4. Keeps appointment records.

Telephone:
1. Takes and records telephone messages.
2. Secures information via telephone.
3. Places long distance calls.
4. Keeps record of telephone calls.

MAIL CLERK

14.0403

Job Description: Sorts incoming mail for distribution and dispatches outgoing mail. Opens envelopes by hand or with letter-opening machine. Stamps date and time of receipt on incoming mail. Sorts mail according to destination and type, such as returned letters, adjustments, bills, orders, and payments. Readdresses undeliverable mail bearing insufficient or incorrect address. Examines outgoing mail for appearance and seals envelopes by hand or with envelope-sealing machine. Stamps outgoing mail by hand or with postage meter. May fold letters or circulars and insert into envelopes. May distribute and collect mail. May weigh mail to determine that postage is sufficient. May keep record of registered mail. May address mail, using addressing machine. May be designated according to type of mail handled as Direct-Mail Clerk, Registered-Mail Clerk, etc.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives a brief overview of the company--its organization, role in the business community, products made or services rendered, types of clients or customers served.
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.
4. Receives information regarding job efficiency--following directions, askingquestions, following standard company practices, producing work on time, maintaining high standards, checking facts and figures.
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.
6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.
7. Receives explanation of work flow within the office and the importance of the student's job to total office output.
8. Meets supervisory personnel and office staff.

Incoming Mail:

1. Marks the date and time on all letters with pen, pencil, rubber stamp, or time stamp machine.
2. Opens incoming mail immediately upon receipt either by hand or by machine.
3. Sorts the mail according to addressee or department.
4. Removes and carefully examines letters and other enclosures, attaching these to the letter.
5. Distributes the mail to departments and addressees.
6. Checks letters for signature and address before discarding envelope.
7. Notes omission of any enclosure in margin of the letter.
8. Keeps log of missing enclosures, checks, stamps, cash, etc.
9. Does not open personal or confidential mail. If it happens accidently, puts letter back, reseals and writes on envelope Sorry Opened by Mistake. Adds initials.

10. Sees that special delivery and registered letters do not go out with regular mail but are dispersed immediately upon receipt in mail rooms.
11. Keeps a register of expected mail and one of registered, insured, and special delivery received.
12. Routes multi-distribution mail by attaching slips with necessary names and department.
13. Photocopies material to be sent to two or more persons or departments when necessary.

Outgoing Mail:

1. Collects mail from outgoing boxes at regular intervals.
2. Sorts mail into various classes, keeping interoffice mail separate.
3. Weighs the outgoing mail and determines postage.
4. Determines what is to be sent by parcel post and the size and weight limitations of parcel post packages.
5. Determines parcel post zones.
6. Uses special services of post office, such as Certified Mail, Special Delivery, Registry, and Return Receipt when necessary.
7. Operates postage meter--involving imprinting of postage seals and adhesive paper tape.
8. Seals envelopes of bulk mail.
9. Attaches stamps to bulk mail if no postage machine is available.
10. Folds business letters and inserts into envelopes.
11. Sorts mail according to class, city, and state.
12. Places mail in mail box or takes parcel post to post office.
13. Purchases stamps or necessary postage for postage meter.
14. Sorts and bags in regular interoffice envelopes any branch mail.
15. Uses Postal Service Manual or Mailers Guide to Postal Service if questions arise.

Office Communications:

1. Takes and records telephone messages.
2. Answers inquiries via telephone concerning specific enclosures or pieces of missing mail.
3. Types routine correspondence and interoffice memorandums.

Filing:

1. Receives explanation of structure and use of filing systems used.
2. Files incoming correspondence.
3. Files copies of outgoing correspondence.
4. Retrieves materials and information from files.

INDIVIDUALIZED TRAINING PLAN

Copy: ___________

Name ______________________________ Job Title Mail Clerk

Firm ______________________________ Training Sponsor ______________________

Student's Career Objective ____

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Reports to Personnel for interview and completing of necessary forms.				
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).				Developed by Richard Gochenour, Groveton High School, Alexandria, Virginia
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions, emergency numbers for reporting absences, etc.				
4. Meets supervisory personnel and office staff.				
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, sincerity, and loyalty.				
6. Receives information about correct comany image--dress,				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
grooming, voice, posture, quality of work.				
7. Receives explanation of work flow within the office and the importance of the student's job to total office output.				
ADDITIONS AS TRAINING REQUIRES				
Incoming Mail:				
1. Opens incoming mail immediately upon receipt by letter opener machine.				
2. Sorts the mail according to offices within directorate, other directorates, or out-going mail.				
3. Removes and carefully examines letters and other enclosures, carefully attaching these to the letter.				
4. Distributes the mail within directorate.				
5. Checks letters for signature and address before discarding envelope.				
6. Notes omission of any enclosure in margin of letter.				
7. Keeps log of missing enclosures, checks, stamps, cash, etc.				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
8. Does not open personal or confidential mail.				
9. Sees that Special Delivery and Registered letters do not go out with regular mail.				
10. Keeps a register of expected mail and one of Registered, Insured, and Special Delivery received.				
11. Operates xerox copier to photocopy material to be sent to two or more persons or departments when necessary.				
ADDITIONS AS TRAINING REQUIRES				
Outgoing Mail: 1. Collects mail from outgoing boxes/offices at regular intervals.				
2. Sorts mail into various classes, departments, etc.				
ADDITIONS AS TRAINING REQUIRES				
Office Communications: 1. Takes and records telephone messages.				
2. Answers inquiries via telephone concerning specific				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
enclosures or pieces of missing mail. ADDITIONS AS TRAINING REQUIRES				
Other: 1. Makes up confidential Reading File daily. 2. Routes Reading File to all offices within directorate. 3. Destroys all classified material as directed by using shredding machine--Destroyit Shredding Machine. 4. Delivers messages. 5. Periodically shops at Self-Service Supply Center and picks up selected office supplies--paper, pencils, steno pads, xerox paper, tone, oil, and developer. 6. Assists in preparing of charts, view charts, graphs, and other visual aids. ADDITIONS AS TRAINING REQUIRES				

RECEPTIONIST

14.0406

Job Description: Receives clients or customers coming into establishment, ascertains their wants, and directs them accordingly. Obtains caller's name and arranges for caller to see person called upon. Directs caller to the destination and records name, time of call, nature of business, and person called upon. May make future appointments and answer inquiries. May perform variety of clerical duties and other duties pertinent to the type of establishment. May collect and distribute mail and messages. May receive patients in office of physician, dentist, or other health service and be designated as receptionist.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives a brief overview of the company--its organization, role in the business community, products made or services rendered, types of clients or customers served.
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.
4. Receives information regarding job efficiency--following directions, asking questions, following standard company practices, producing work on time, maintaining high standards, checking facts and figures.
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.
6. Receives information about correct company image--dress, grooming, voice posture, quality of work.
7. Receives explanation of work flow within the office and the importance of the student's job to total office output.
8. Meets supervisory personnel and office staff.

Receiving Callers:

1. Greets callers.
2. Assists callers in the reception area.
3. Announces callers.
4. Maintains visitors' log.
5. Arranges appointments.
6. Receives and records payments for services.
7. Issues visitors' passes or identification cards.
8. Refers callers to appropriate person.
9. Escorts caller to office of person being visited.
10. Makes introduction.
11. Receives instruction on handling emergencies and unexpected callers.
12. Receives instruction on handling angry or unruly callers.

Scheduling Appointments:

1. Receives explanation of method of scheduling and recording appointments.

Scheduling Appointments cont'd.

2. Receives explanation of method of registering office callers.
3. Receives explanation of procedures followed in cancellation and rescheduling of appointments.
4. Maintains a calendar of appointments.

Telephone and Switchboard Techniques:

1. Answers the telephone.
2. Screens telephone calls.
3. Gives directions to persons over the telephone. Answers inquiries over the telephone.
4. Places telephone calls--local and long distance, using direct dialing when possible.
5. Revises and updates telephone directory.
6. Keeps telephone records such as frequently called numbers.
7. Records and delivers telephone messages.
8. Uses various types of equipment such as PEX, call director, button phone, data phone.
9. Pages people on intercom.
10. Sends and receives telegrams.

Mail and Mail Procedures:

1. Opens and sorts mail.
2. Stamps date and time on incoming mail.
3. Records certified mail.
4. Reroutes mail.
5. Stores mail until regular delivery time.
6. Folds letters for outgoing mail.
7. Stuffs and seals envelopes.
8. Sorts outgoing mail by class and destination.
9. Weighs and stamps mail.
10. Uses postage meter.

Filing:

1. Maintains files of:
    a. visitors' business cards
    b. frequently called telephone numbers
2. Files material alphabetically in personal files.

Typing:

1. Cleans and maintains typewriter.
2. Changes ribbons when necessary.
3. Types mailable letters, memoranda, tabulations, and reports from rough draft and corrected copy.
4. Types neat, clean carbons for letters.
5. Types labels, cards, envelopes, and information on various types of business forms.

Recordkeeping:

1. Receives and posts customer payments.
2. Administers petty cash fund.

Housekeeping:

1. Keeps reception area neat and attractively arranged.
2. Provides current reading material.

SECRETARY 14.0702

Job Description: Schedules appointments, gives information to callers, takes dictation, and otherwise relieves officials of clerical work and minor administrative and business detail. Reads and routes incoming mail. Locates and attaches appropriate file to correspondence to be answered by employer. Takes dictation in shorthand or on Stenotype machine and transcribes notes on typewriter, or transcribes from voice recordings. Composes and types routine correspondence. Files and gives information to callers or routes call to appropriate official and places outgoing calls. Schedules appointments for employer. Greets visitors, ascertains nature of business, and conducts visitors to employer or appropriate person. May not take dictation. May arrange travel schedule and reservations. May compile and type statistical reports. May supervise clerical workers. May keep personnel records. May record minutes of staff meeting.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives a brief overview of the company--its organization, role in the business community, products made or services rendered, types of clients or customers served.

2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).

3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.

4. Receives information regarding job efficiency--following directions, asking questions, following standard company practices, producing work on time, maintaining high standards, checking facts and figures.

5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.

6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.

7. Receives explanation of work flow within the office and the importance of the student's job to total office output.

8. Meets supervisory personnel and office staff.

Typewriting and Shorthand:

1. Types the following from direct dictation, shorthand notes, transcribing machine, handwritten rough drafts, corrected copies, and/or data

366

compiled by student-learner:
   a. envelopes, cards, and labels
   b. spirit, stencil, and offset mats
   c. statistical reports
   d. minutes of meetings
   e. memoranda
   f. letters
   g. reports
   h. itineraries
   i. business forms
   j. telegrams

2. Composes and types replies to routine correspondence.

3. Types copy where all lines end at right margin (justifying).

4. Types display or decorative type copy.

5. Edits letters dictated by employer.

6. Takes dictation over the telephone.

7. Cleans and maintains typewriter--includes changing of carbon and fabric ribbons.

Recordkeeping:

1. Receives and posts customer payments.

2. Writes receipts for cash payments or when requested by customers.

3. Keeps customers accounts up to date and accurate.

4. Prepares monthly reports for accounting department.

5. Prepares bank deposits.

6. Reconciles bank statements.

7. Tabulates and/or posts data in record books.

8. Prepares the payroll.

9. Administers petty cash fund.

10. Prepares stock inventory.

Filing:

1. Receives explanation of structure and use of filing systems in the office.

2. Reads, codes, and sorts material to be filed.

3. Files:
    a. Incoming correspondence, orders, invoices, price lists, and other materials.
    b. Copies of outgoing correspondence.
4. Prepares new file folders when instructed to do so.
5. Maintains records of materials removed from files.
6. Traces missing file data.
7. Destroys obsolete file materials or transfers them to inactive storage when instructed to do so.
8. Replaces worn folders, labels, and index cards.

Receptionist:

1. Greets visitors.
2. Refers callers to appropriate person or makes appointments for them.
3. Handles inquiries or requests whenever appropriate.
4. Keeps appointment records.

Telephone:

1. Places local and long distance calls.
2. Records and delivers telephone messages.
3. Routes calls to persons within the organization.
4. Secures information via telephone.
5. Takes orders for merchandise or services.
6. Answers telephone inquiries.
7. Handles complaints via telephone.
8. Relieves switchboard operator.

Handling Mail:

1. Handles incoming mail:
    a. Time stamps, sorts, and distributes.
    b. Replies to routine mail as directed.
2. Prepares outgoing mail:
    a. Collects outgoing mail
    b. Addresses envelopes and packages by typing, handwriting, or

using addressograph machines.

c. Stuffs envelopes by hand or with machine.
d. Wraps packages
e. Computes and affixes postage manually or with postage meter
f. Keeps record of postage used.
g. Batches mail to be sent to post office.

Organizing and Planning:

1. Arranges itineraries.
2. Arranges for training aids, facilities, and equipment.
3. Makes preparations for meetings.
4. Plans own work.
5. Prepares agenda for meetings.
6. Obtains information needed for correspondence from various departments.

Housekeeping:

1. Maintains orderly desk, files, and work area.
2. Keeps reception area area neat and attractively arranged.
3. Provides current reading material.

INDIVIDUALIZED TRAINING PLAN

Copy: ____________

Name ______________________________ Job Title Secretary (trainee)

Firm ______________________________ Training Sponsor ____________________

Student's Career Objective ____

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Receives a brief overview of the agency--policies, procedures and objectives. Role of the agency in the business world, services rendered, types of clients and/or customers served.				
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance retirement, hospitalization).				
3. Receives explanation of structure of department to which assigned.				
4. Receives explanation of employment schedule--breaks, holidays, vacations, performance award ratings, within-grade increases, promotions.				
5. Receives information regarding job efficiency--following standard agency practices, producing work on time,				

Developed by Bette E. Lamb, Wakefield High School, Arlington, Virginia.

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
maintaining high degree of quality and quantity when a variety of duties are involving proofreading data.				
6. Receives information about appropriate dress and grooming.				
7. Receives explanation of the importance of poise, tact, and courtesy.				
8. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.				
9. Receives explanation of work flow within the office and the importance of the student's job to total office output.				
10. Meets supervisory personnel and office staff.				
ADDITIONS AS TRAINING REQUIRES				
Typewriting & Shorthand:				
1. Uses electric typewriter.				
2. Cleans and maintains typewriter--including changing carbon and fabric ribbons.				
3. Maintains a supply				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
of shorthand pads, writing instruments and other office materials.				
4. Scans the material to be typed.				
5. Assembles materials necessary for production of copy.				
6. Plans the work for format and placement.				
7. Uses vocabulary and terminology peculiar to the agency.				
8. Types the following from direct dictation, shorthand notes, transcribing machine, handwritten rough drafts, corrected copies, and/or data compiled by student-employee: a. envelopes, cards and labels. b. spirit, stencil, and offset mats. c. statistical reports. d. minutes of meetings. e. memoranda f. letters g. reports h. itineraries i. business forms j. telegrams k. abstracts, summaries. l. briefs				
9. Composes and types routine correspondence from instruction or job knowledge.				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
10. Proofs dictated letter.				
11. Places the final copy in order.				
12. Delivers copy to supervisor for signature.				
13. Duplicates final copy of materials for presentation to decision panel.				
14. Takes dictation over the telephone.				
ADDITIONS AS TRAINING REQUIRES				
Recordkeeping:				
1. Prepares monthly reports.				
2. Maintains production records.				
3. Consolidates and prepares tabulated production reports of hours worked, cases typed, and total pages of copy produced.				
4. Maintains serial number reference data.				
ADDITIONS AS TRAINING REQUIRES				
Filing:				
1. Receives explanation of structure and use of filing systems in the office.				
2. Reads, sorts, and codes materials to be filed.				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
3. Locates and attaches appropriate file to materials to be acted upon.				
4. Files: a. incoming correspondence, serial number control cards, and other materials. b. copies of outgoing correspondence.				
5. Prepares new file folders when necessary.				
6. Retrieves materials and information from files.				
7. Maintains records of materials in file and places endorsement as to the type of correspondence prepared.				
8. Traces missing file data.				
9. Destroys obsolete file materials or transfers to inactive storage.				
10. Replaces worn folders, labels, and index cards.				
ADDITIONS AS TRAINING REQUIRES			374	

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Communicating with Others:				
1. Smiles and exhibits a positive attitude.				
2. Uses good diction.				
3. Greets persons outside the agency and agency personnel.				
4. Receives visitors and directs them to appropriate personnel.				
5. Receives and gives information.				
6. Uses directories, files, and references.				
7. Receives and evaluates information.				
8. Handles inquiries or requests.				
9. Answers telephone inquiries.				
10. Places local and long distance calls.				
11. Records telephone messages on appropriate forms with complete data.				
12. Delivers telephone messages.				
13. Routes calls to persons within the agency.				
14. Secures information via telephone.				
15. Cooperates with others in performing office tasks.				
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Handling Mail: 1. Handles incoming mail: a. receives, date stamps, sorts, and distributes b. replies to routine mail as directed. 2. Prepares outgoing mail: a. collects outgoing mail b. addresses envelopes c. stuffs envelopes d. wraps packages e. uses prepaid government envelopes or affixes postage manually or with postage meter. f. Fetches mail to be sent to post office. g. Separates mail by classification i.e., U.S. or foreign. ADDITIONS AS TRAINING REQUIRES				
Organizing and Planning: 1. Arranges itineraries. 2. Makes preparations for meetings. 3. Prepares agenda for meetings. 4. Arranges for train-			376	

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
ing aids, facilities and equipment.				
5. Plans own work.				
6. Reviews and clips newspaper and technical magazine articles.				
7. Obtains information from appropriate sources when needed for correspondence.				
ADDITIONS AS TRAINING REQUIRES				
Housekeeping:				
1. Maintains orderly desk, files, and work area.				
2. Keeps reception area neat and attractively arranged.				
3. Provides current reading material.				
ADDITIONS AS TRAINING REQURIES				

377

LEGAL SECRETARY 14.0702

Job Description: Takes dicatation and prepares legal papers and correspondence of legal nature, such as summons, complaints, motions, and subpoenas. Handles the incoming and the outgoing mail. Greets visitors, ascertains nature of business, and conducts visitors to appropriate person. Answers the telephone and gives information to callers or routes calls to the appropriate person. Places outgoing telephone calls. Schedules appointments for employer. Files legal papers, correspondence, and other records.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives explanation of Legal Code of Ethics--confidential nature of all communications, oral and written, should be emphasized.

2. Receives explanation of the importance of:
   a. accuracy--comma out of place may be fatal
   b. time--actions must be commenced, concluded, or executed within rigid time limits

3. Receives explanation of office policy concerning proper grooming and office etiquette.

4. Receives explanation of structure of the law office.

5. Receives explanation of flow and procedure of work and how student-learner's job contributes to total office output.

6. Meets all members of the office staff.

Typewriting and Shorthand:

1. Types the following from attorney's direct dictation, shorthand notes, transcribing machine, handwritten rough drafts, corrected copies, and/or data compiled by student-learners.
   a. legal instruments
      1. acknowledgments
      2. articles of incorporation
      3. affidavits
      4. agreements
      5. bankruptcy petitions
      6. briefs
      7. by-laws of a corporation
      8. contracts
      9. deeds
      10. divorce papers
      11. leases
      12. power of attorney
      13. wills and probate

378

b. court papers
  1. complaints
  2. demurrers
  3. instructions to jury
  4. summons and subpoenas
  5. notices of trial
  6. stipulations
  7. interrogatives and answers

2. Types manuscripts for printing in legal style.

3. Corrects galley and page proofs.

4. Types routine correspondence from rough drafts, dictation or dictation equipment.

5. Cleans and maintains typewriter--includes changing of carbon and fabric ribbons.

Recordkeeping:

1. Keeps financial records:
    a. attorney's checkbook
    b. cashbook
    c. general ledger
    d. record of recording fees
    e. record of attorney's time with clients

2. Handles office payroll.

3. Records receipts of cash and checks and posts to clients' accounts.

4. Maintains inventory of supplies; reorders as necessary.

5. Maintains files of sample legal documents and various pleadings.

6. Administers petty cash fund.

7. Maintains an up-to-date record of what is happening and what has happened within the courts, particularly in those cases in which firm has been invoved.

Research:

1. Receives instruction on how to use:
    a. clerk's index system
    b. docket
    c. register
    d. clerk's minute book
    e. court calendar

2. Receives instruction on how to use law library.

3. Receives instruction on how to use:
    a. National Reporter System
    b. blue books
    c. white books
    d. American Digest
    e. Shepard's Citations
    f. form books
    g. reference books

4. Gathers information about cases.

5. Assists in obtaining and organizing facts for documents.

Filing:

1. Receives explanation of structure and use of files.

2. Maintains files:
    a. client
    b. general
    c. personal
    d. tickler
    e. follow-up
    f. daily court dockets
    g. reports of bar associations
    h. newspaper articles concerning cases in which attorney is involved or might be interested in

3. Establishes new case files.

4. Files tax supplements in tax books.

5. Uses cross-referencing and retention plans.

6. Uses charge-out methods on materials removed from files.

Receptionist:

1. Greets clients and visitors.

2. Obtains information on new clients; completes required forms.

3. Schedules appointments.

4. Keeps appointment book up to date.

5. Checks court dockets daily to determine whether changes may have been made since the day before.

Telephone:

1. Places local and long distance calls.

Telephone cont'd.

2. Keeps current the directory of telephone numbers of:
    a. attorneys associated in current cases
    b. attorneys to recommend for work your office does not handle
    c. attorneys on opposite side of current cases

3. Records and delivers telephone messages.

4. Routes calls to attorneys within the firm.

5. Secures information via telephone.

6. Answers telephone inquiries.

Mail Handling:

1. Handles incoming mail:
    a. time stamps, sorts, and distributes
    b. replies to routine mail as directed

2. Prepares outgoing mail:
    a. collects outgoing mail
    b. addresses envelopes and packages by typing, handwriting, or using addressograph machine
    c. stuffs envelopes by hand or with machine
    d. wraps packages
    e. computes and affixes postage manually or with postage meter
    f. keeps record of postage used
    g. batches mail to be sent to post office

Housekeeping:

1. Maintains orderly desk, files, and work area.

2. Keeps reception area neat and attractively arranged.

3. Provides current reading material.

INDIVIDUALIZED TRAINING PLAN

Copy: ____________

Name ______________________________ Job Title Legal Secretary (trainee)

Firm ______________________________ Training Sponsor ________________________

Student's Career Objective ____

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Becomes acquainted with fellow employees and supervisory personnel.				
2. Becomes familiar with personnel policies.				Developed by Mrs. Gail F. Ross, I. C. Norcom High School. Portsmouth, Virginia
3. Receives explanation of the importance of such ideas as loyalty, confidentiality, dependability, cooperation, personal grooming, initiative and overall professional attitude.				
4. Receives explanation of exactly where responsibility lies in the overall functioning of the firm and how the student-learner can help the firm function smoothly.				
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Courts and Court Procedures:				
1. Develops an awareness of the court system within the jurisdiction in which working.				
2. Develops an interest in the different types of courts.				
3. Develops an interest in the different types of cases which are held in various courts and under what circumstances they may be tried differently.				
4. Shows a keen interest in each and every client employer must try in court and stands behind employer through each case.				
5. Maintains an up-to-date record of what is happening and what has happened within the courts, particularly in those cases in which employer's office has been involved.				
ADDITIONS AS TRAINING REQUIRES				
Professional Attitude:				
1. Supports State and National Legal Secretaries Association, via membership, participation, and interest.				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
2. Maintains at all times a professional attitude regarding position.				
3. Remembers that confidential means inside and outside the office in both professional and personal circumstances.				
4. Displays loyalty above all.				
ADDITIONS AS TRAINING REQUIRES				
Typewriting & Shorthand:				
1. Types the following from attorneys direct dictation, shorthand notes, transcribing machine, handwritten rough drafts, corrected copies, and data compiled by student-learner: a. legal instruments such as contracts, wills powers of attorney, bankruptcy petitions auto negligence, etc. b. court papers such as compliants, demurrers and interogatives.				
2. Types routine correspondence from rough drafts, dictation, and				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
transcribing machine.				
3. Receives in-class instruction in court-reporting (acquaintenceship level).				
4. Receives in-class instruction in use of Stenograph machine (acquaintenceship level).				
5. Performs the duties of any secretary inscfar as the care of equipment such as cleaning and other maintenance.				
6. Maintains file of all typewritten pleadings in order to be consistent in typing at all times.				
ADDITIONS AS TRAINING REQUIRES				
Receptionist:				
1. Greets all clients, making them feel as comfortable as possible.				
2. Makes appointments for clients.				
3. Displays an attitude of courtesy at all times, regardless of the particular situation.				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
4. Answers the telephone properly and with interest; takes all messages. 5. Maintains a calendar file to keep employer's appointments in order and on time. 6. Checks court dockets daily to determine whether changes have been made since the day before. ADDITIONS AS TRAINING REQUIRES				
Filing and Records Management: 1. Files incoming and copies of outgoing correspondence. 2. Files invoices, bills, receipts, lists, orders, statistical data, minutes, reports, requisitions. 3. Retrieves materials and information from files. 4. Maintains files on daily court dockets. 5. Files newspaper articles concerning cases in which employer is involved or might be interested for future reference. ADDITIONS AS TRAINING REQUIRES			386	

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Office Management: 1. Maintains perpetual inventory of supplies used within the office in order to avoid delay of production. 2. Keeps supply closet in order so that it can be used more efficiently by all concerned. ADDITIONS AS TRAINING REQUIRES				
Recordkeeping: 1. Receives and posts customer payments. 2. Receipts all payments received personally. 3. Sends out monthly statements. 4. Keeps record of all amounts reimbursed by client so that employer does not pay expenses which should be paid for him. 5. Maintains records stipulating exactly who will be responsible for paying what portion of fees and how much such fees will be. 6. Collects certain fees as stipulated				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
by employer so that he does not have to bother with trivial fees. ADDITIONS AS TRAINING REQUIRES				
Office Machines: 1. Adds columns of figures on 10-key adding machine and full-key calculator. 2. Subtracts, divides and multiplies on calculator. ADDITIONS AS TRAINING REQUIRES				

MEDICAL SECRETARY 14.0702

Job Description: Performs basic secretarial duties requiring the use of the typewriter for the majority of work assignments. Prepares medical charts and reports for doctors and hospital personnel, utilizing knowledge of medical terminology. Types medical history reports, insurance forms, bills, memorandums, correspondence and other materials to be filed and/or duplicated. Opens and routes incoming mail and attaches appropriate file for patient. Files and secures materials from files. Receives and places telephone calls. Computes totals by using adding machines or calculators. Transcribes dictation utilizing shorthand, stenotype, or other transcribing methods. Greets patients or guests, ascertaining their wants and directs them accordingly; schedules appointments; answers inquiries over the telephone.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives explanation of hospital, clinic, or office rules and regulations, personnel and other policies.

2. Receives information about layout of hospital, clinic, or office and structure of department to which assigned.

3. Receives explanation of the importance of absolute accuracy in dealing with patients' records.

4. Receives explanation of Code of Ethics in medical profession:
    a. diagnosis (present and past)
    b. examinations

5. Receives information about hospital's, clinic's, or office's system of;
    a. filing
    b. billing
    c. bookkeeping

6. Meets department staff.

Typewriting and Shorthand:

1. Types the following from doctors' direct dictation, shorthand notes, transcribing machine, handwritten rough drafts, corrected copies and/or data compiled by student-learner:
    a. medical record and ledger
    b. preadmission registration
    c. request for payment
    d. surgeon's report
    e. standard medical report
    f. admissions record
    g. group hospital insurance

   h. individual hospital insurance form (including Medicare and Medicaid forms)
   i. inpatient hospital admission and billing
   j. outpatient hospital billing
   k. patient index card
   l. patient transfer form
   m. patient histories
   n. patient physicals
   o. nursing home admission record
   p. analysis of hospital service
   q. admission and discharge registers

2. Composes and types collection letters and letters about appointments and referrals, insurance, fees, supplies, and equipment.

3. Types envelopes, cards, and labels.

4. Types doctors' personal correspondence.

5. Cleans and maintains typewriter--includes changing of carbon and fabric ribbons.

Recordkeeping:

1. Keeps financial records:
   a. doctor's checkbook
   b. daily record of collections
   c. patient's accounts
   d. cashbook
   e. general ledger

2. Administers petty cash fund.

3. Receives and credits payments from patients.

4. Prepares and sends statements to patients.

5. Maintains supplies inventory; reorders when necessary.

Filing:

1. Receives explanation of structure and use of files.

2. Maintains files:
   a. patient
   b. general
   c. personal
   d. tickler
   e. follow-up

3. Retrieves charts from files on patients with appointments or as registration is accepted.

4. Records information in patient files.
    a. diagnosis
    b. x-ray reports
    c. lab reports
    d. operative reports
    e. medication/prescriptions
    f. history

5. Transfers patient files to other doctors.

Receptionist Duties:
1. Greets patients and visitors.

2. Obtains information on new patients; completes required forms.

3. Schedules appointments.

4. Keeps appointment book up to date.

Telephone Duties:
1. Answers telephone.

2. Routes calls for immediate medical aid to nurse or doctor.

3. Uses telephone to:
    a. obtain results of tests on patients
    b. schedule tests for patients
    c. arrange hospital admittance for patients
    d. schedule out-patient examinations
    e. dispatch medical information to hospital or insurance companies
    f. remind patients of appointments

Mail Handling:
1. Opens and distributes incoming mail.

2. Prepares outgoing correspondence for mailing.

Clinical Duties:
1. Prepares patients for examination:
    a. weighing
    b. pulse
    c. temperature

2. Obtains urine specimens.

3. Aids doctors whenever requested to do so.

4. Prepares injections.

Housekeeping Duties:

1. Cleans and sets up examination rooms.
2. Straightens waiting room.
3. Straightens doctor's desk.
4. Keeps examination rooms supplied with gowns, sheets, and other necessary items.

392

INDIVIDUALIZED TRAINING PLAN

Copy: ________

Name ______________________ Job Title Medical Secretary (trainee)

Firm ______________________ Training Sponsor ______________________

Student's Career Objective ______________________

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Receives explanation of Code of Ethics in medical profession: a. diagnosis b. examinations				
2. Receives information about office system of: a. filing b. billing c. bookkkeeping				Developed by Ruth S. Blankenship, George Washington High School, Danville, Virginia
3. Receives explanation of work schedule and any specific directions on code of dress.				
4. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.				
5. Tours office facilities and meets co-workers.				
6. Examines work area and locates supplies.				
7. Completes work permit forms.				
8. Completes payroll deduction forms.				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
ADDITIONS AS TRAINING REQUIRES				
Typewriting and Transcription:				
1. Copies schedule of doctors' on-call work schedule for hospital and answering service.				
2. Drafts requests and replies for needed medical information.				
3. Transcribes and types letters from a dictaphone.				
4. Selects and types medical information for Medicaid and group insurance forms from medical records.				
5. Orders office supplies.				
6. Records data on charts.				
7. Completes insurance forms to file claims for payment.				
8. Cleans and maintains typewriter--includes changing of carbon and fabric ribbons.				
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVAULATION	INDIVIDUAL RELATED INSTRUCTION
Recordkeeping:				
1. Keeps financial records: a. daily record of collections b. patient's accts. c. cashbook				
2. Administers petty cash fund.				
3. Prepares and sends statements to patients.				
4. Writes charge slips to the doctor.				
5. Posts the charge from this slip as it accompanies chart back to office.				
6. Totals the charge slip and extends the transaction to the patient's permanent charge record.				
7. Reconciles the cash balance daily.				
8. Registers Emergency Room and home visitations from slip presented by doctor on call the previous night or weekend.				
9. Registers charges on patients in hospital.				
10. Retrieves past-due accounts from the accounts receivable file monthly.				
11. Sends past-due notices.				
12. Copies statements of account.				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
13. Folds and inserts statements in envelopes.				
14. Dispenses charge cards to collector on accounts which are determined uncollectible.				
15. Computes payroll deductions.				
16. Writes payroll checks.				
17. Reconciles bank statments.				
ADDITIONS AS TRAINING REQUIRES				
Filing:				
1. Receives explanation of structure and use of files.				
2. Obtains names of patient's father to locate previous record on file.				
3. Retrieves charts from files on patients with appointments or as registration is accepted.				
4. Documents a new chart for new patient.				
5. Files charts at intervals during the day and finishes filing of charts by the end of the day.				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
6. Registers the date of professional service on the patient's chart.				
7. Records information in patient files: a. diagnosis b. x-ray reports c. lab reports d. operative reports e. medication/prescription f. history				
ADDITIONS AS TRAINING REQUIRES				
Receptionist Duties:				
1. Greets patients and visitors.				
2. Schedules appointments.				
3. Keeps appointment book up to date.				
ADDITIONS AS TRAINING REQUIRES				
Telephone Duties:				
1. Answers telephone.				
2. Routes calls for immediate medical aid to nurse or doctor.				
3. Uses telphone: a. obtain result of tests. b. schedule tests or treatments. c. Arrange hospital				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
admittance. d. Dispatch medical information to hospital or insurance companies. ADDITIONS AS TRAINING REQUIRES				
Mail Handling: 1. Opens, sorts, and distributes incoming mail. 2. Feeds outgoing mail through postage machine. 3. Purchases additional postage as needed. ADDITIONS AS TRAINING REQUIRES				
Housekeeping Duties: 1. Straightens waiting room. 2. Straightens doctors' desks. 3. Dusts work area and arranges materials conveniently. ADDITIONS AS TRAINING REQUIRES				

STENOGRAPHER

14.0703

Job Description: Takes dictation in shorthand from one or more persons and, in most cases, is under close supervision of immediate supervisor. Dictation material includes correspondence, reports, and other information which is transcribed on the typewriter. Mail handling and records management are the supportive activities most frequently associated with taking dictation. May transcribe recorded material. May perform a variety of related clerical duties: answering the telephone, greeting visitors, making appointments, cutting stencils, operating duplicating as well as transcribing and other equipment. Familiarity with a specialized vocabulary is sometimes required.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives explanation of company policies.
2. Receives explanation of the importance of loyalty, dependability, initiative, cooperation, dress and grooming, office etiquette, good speech, and the maintenance of a high production level.
3. Receives explanation of the proper office attitude toward the job, toward responsibilities, and toward others.
4. Receives explanation of the company manual and of the company policies (vacation policies, hours of work, coffee break policies, etc.)
5. Receives explanation of structure of department to which assigned.
6. Receives explanation of flow and procedure of work and how student-learner's job contributes to total office output.
7. Meets supervisory personnel and office staff.

Dictation:

1. Takes dictation in shorthand of correspondence, reports, and other matter.
2. Keeps dictation tools accessible at all times (notebook, pens, pencils, reference manual, and dictionary).
3. Uses pauses in the dictation to reread notes, insert necessary punctuation marks, correct poor outlines, make longhand notes when necessary, or insert symbols to signify words which must be checked for meaning or spelling.
4. Makes changes in notes, such as deletions or additions, in the correct manner.

Typewriting and Transcription:

1. Transcribes all dictated material after editing the shorthand notes (using dictionary and reference manuals when needed).
2. Makes carbon copies of transcripts.
3. Makes corrections of transcript and carbon while typing.
4. Proofread transcript.
5. Types envelope for transcript and attaches enclosures.
6. Takes transcript to employer for signature.
7. Types envelopes for carbon copies and takes carbon copies to employer for initialing.
8. Cleans and maintains the typewriter--includes changing carbon and fabric ribbons.

Machine Transcription:

1. Transcribes letters, reports, or other recorded data, using transcribing machine and typewriter.
2. Maintains a file of belts or tapes.

3. Maintains transcribing machine and belts or tapes in working order.
4. Proofreads letters carefully before removing them from the typewriter.
5. Types envelope for transcript and attaches enclosures.
6. Makes carbon copies of transcripts.
7. Takes transcript to employer for signature.
8. Prepares envelopes for carbon copies and takes copies to employer for initialing.

Filing:

1. Receives explanation of filing system employed in business.
2. Files incoming correspondence and copies of outgoing correspondence.
3. Opens new file folders when instructed or when deemed necessary.
4. Retrieves material and information from files.
5. Traces information temporarily missing from files.
6. Maintains follow-up system.
7. Checks order and condition of files periodically;straightens, repairs, replaces as necessary.
8. Destroys obsolete materials or transfers to inactive and/or storage files when instructed to do so.

Mail:

1. Determines the class of outgoing mail.
2. Determines postage required and affixes it to mail.
3. Uses a postal scale and rate tables.
4. Receives and sorts incoming mail; routes mail.
5. Opens employer's mail and attends to it if requested.
6. Maintains mail log.
7. Uses Zip Code Directory, Cross Reference, etc.

Receptionist Duties:

1. Greets visitors.
2. Refers callers to appropriate person or makes appointments for them.
3. Handles inquiries or requests whenever appropriate.
4. Keeps appointment records.

Telephone:

1. Takes and records telephone messages.
2. Secures information via telephone.
3. Places long distance calls.
4. Keeps record of telephone calls.

Duplicating:

1. Types spirit master for duplicating and operates spirit duplicator.
2. Types stencil for duplication and operates mimeograph machine.
3. Operates photocopying machine.

Office Supplies:

1. Organizes and maintains supply room.
2. Maintains supply inventory.
3. Reorders supplies.

CLERK-TYPIST 14.0901

Job Description: Performs general clerical work requiring the use of the typewriter in the majority of duties. Types letters, reports, bills, applications, contracts, late payment notices, and other materials to be filed. Files and secures materials from numeric and alphabetic files. Posts amounts to customer accounts. Sorts and distributes the mail. Answers the telephone. Uses adding and calculating machines, reproducing machines, and transcribing machines. Receptionist duties include receiving clients or customers, ascertaining their wants and directing them accordingly; making appointments; answering inquiries over the telephone; and making future appointments.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives a brief overview of the company--its organization, role in the business community, products made or services rendered, types of clients or customers served.

2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).

3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.

4. Receives information regarding job efficiency--following directions, asking questions, following standard company practices, producing work on time, maintaining high standards, checking facts and figures.

5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.

6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.

7. Receives explanation of work flow within the office and the importance of the student's job to total office output.

8. Meets supervisory personnel and office staff.

Typewriting:

1. Operates both electric and manual typewriters.

2. Cleans and maintains typewriter--includes changing of carbon and fabric ribbons.

3. Uses eraser, correction tape, and correction fluid to produce neat corrections.

4. Edits material before typing--grammar, spelling, punctuation, meaning, paragraphing.

401

5. Chooses proper paper, carbon paper, and other supplies for all jobs.

6. Types accurate letters, reports, forms, statistical material and memorandums from rough draft, corrected copy, direct dictations, and transcribing machines.

7. Types envelopes, cards, and labels.

8. Types stencils, masters, or plates from rough drafts or corrected copy.

9. Composes and types answers to routine letters.

10. Proofreads, corrects, and evaluates quality of all work before returning it to supervisor.

Duplicating:

1. Operates fluid and ink duplicators.

2. Operates photocopy machines.

3. Stores, files, or disposes of masters and stencils.

4. Collates duplicated materials.

Filing:

1. Receives explanation of structure and use of filing systems in the office.

2. Files incoming correspondence.

3. Files copies of outgoing correspondence.

4. Files invoices, bills, receipts, lists, orders, statistical data, minutes, reports, requisitions.

5. Retrieves materials and information from files.

Receptionist:

1. Greets visitors.

2. Refers callers to appropriate person or makes appointments for them.

3. Handles inquiries or requests whenever appropriate.

4. Keeps appointment records.

Telephone:

1. Places local and long distance calls.

2. Records and delivers telephone messages.

3. Routes calls to persons within the organization.

4. Secures information via telephone.

5. Takes orders for merchandise or services.

6. Answers telephone inquiries.

7. Handles complaints via telephone.

Handling Mail:

1. Handles incoming mail:
    a. time stamps, sorts, and distributes
    b. replies to routine mail as directed

2. Prepares outgoing mail:
    a. collects outgoing mail
    b. addresses envelopes and packages by typing, handwriting, or using addressograph machine
    c. stuffs envelopes by hand or with machine
    d. wraps packages
    e. computes and affixes postage manually or with postage meter
    f. keeps record of postage used
    g. batches mail to be sent to post office

Recordkeeping:

1. Receives and posts customer payments.

2. Writes receipts for cash payments.

3. Keeps customer accounts up to date and accurate.

4. Tabulates and/or posts data in record books.

5. Orders, receives, stores, and maintains inventories of supplies.

Office Machine Operation:

1. Operates the follwing machines:
    a. electric and manual typewriters
    b. duplicating and photocopy machines
    c. addressograph machine
    d. postage machine
    e. adding and calculating machines
    f. transcribing machines

2. Uses intercoms and multi-line telephone.

INDIVIDUALIZED TRAINING PLAN

Copy: ________

Name ______________________ Job Title Clerk-Typist

Firm ______________________ Training Sponsor ______________________

Student's Career Objective ______________________

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Receives overview of organization's role in business community, services rendered to members and community.				
2. Receives salary information.				
3. Receives explanation of policies regarding working hours, breaks, holidays, vacation and promotions.				
4. Receives information on the importance of accuracy, proofreading, and production.				
5. Meets co-workers and supervisor.				
6. Receives procedures book.				
ADDITIONS AS TRAINING REQUIRES				
Receptionist:				
1. Greets visitors.			404	
2. Refer callers and make appointments.				

Developed by Richard Daiger, Robinson Secondary School, Fairfax, Virginia

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
3. Handles inquires and requests. 4. Handles requests and makes appointments on the telephone. ADDITIONS AS TRAINING REQUIRES				
Typing: 1. Uses electric Olympia with carbon ribbon. 2. Types letters from handwritten notes. 3. Types form letters using the MT/ST. 4. Types mimeograph stencils. 5. Types memoes and billing statements. ADDITIONS AS TRAINING REQUIRES				
Mimeograph Operator: 1. Prepares and runs stencils for mailings to membership. ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INSTRUCTION RELATED INSTRUCTION
Addressing Machine Operator: 1. Prepares new address cards. 2. Runs evelopes for membership mailings. ADDITIONS AS TRAINING REQUIRES				
Xerox Machine Operator: 1. Runs copies of materials for members. 2. Runs copies of correspondence for filing. ADDITIONS AS TRAINING REQUIRES				
File Clerk: 1. Files and locates correspondence. 2. Locates information for members and guests. ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Postage Machine Operator 1. Handles out-going mail, affixing postage with postage machine. ADDITIONS AS TRAINING REQUIRES				
Other Duties: 1. Sets up answering service device before closing. 2. Makes and serves tea to visitors. 3. Cleans desk, dishes, and empties trash cans (general office cleaning). 4. Runs errands--deliveries to members; getting signatures on letters, checks, etc; obtaining needed office supplies. ADDITIONS AS TRAINING REQUIRES				

KEY-PUNCH OPERATOR

14.220201

Job Description: Operates key-punch machine to transcribe numeric and/or alphabetic data from source material onto punch cards. Plans and prepares program cards to control duplicating, spacing, alphabetic or numeric punching, and skipping while performing a job of repetitive data. May tend machines in tabulating department.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives a brief overview of the company--its organization, role in the business community, products made or services rendered, types of clients or customers served.
2. Receives basic salary information--payroll period, computations of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.
4. Receives information regarding job efficiency--following directions, asking questions, following standard company practices, producing work on time, maintaining high standards, checking facts and figures.
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.
6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.
7. Receives explanation of work flow within the office and the student's job to total office output.
8. Meets supervisory personnel and office staff.

Data Preparation:

1. Receives and checks source material for completeness.
2. Detects invalid characters, spelling, and phrases on source material.
3. Prepares card layout and designs card fields to accommodate numbers and words of varying lengths.

Program Card Preparation:

1. Prepares:
   a. standard program cards
   b. alternate program cards
   c. alternate with left-zero program cards
2. Removed drum, places program card on drum, re-inserts drum.

Key-Punch Operations:

1. Uses functional switches--main-line, print, clear program selection, auto/skip, card feed.
2. Records coded or uncoded data--using numeric, alpha, backspace, release, and duplicate keys--with speed and accuracy.
3. Works from source materials which may or may not be arranged for card punching.

Verifier Operations:

1. Operates verifier with speed and accuracy.
2. Uses program cards for each job performed.
3. Identifies error and non-error cards before they reach the card stacker within established speed and accuracy limits.
4. Produces correct versions of incorrectly punched cards.
5. Picks out error cards from decks of verified cards.
6. Discards incorrectly punched cards.
7. Identifies error cards from decks by comparing source documents with tabulated print-outs within established speed and accuracy limits.

Office Communications/Related Duties:

1. Routes completed cards to next work station.
2. Files and removes cards from master files.

Machine Maintenance:

1. Changes fuses, empties chip box, and changes ribbons.
2. Requisitions needed supplies.
3. Keeps work area and equipment clean.
4. Detects faulty feeding, positioning, ejecting, duplicating, skipping, punching, or other mechanical malfunctions and notifies supervisor.
5. Uses prying knife to remove jammed cards.

APPENDIX C

MISCELLANEOUS FORMS — PAGE

1. Coordination Visit Report* 368
2. Weekly Coordination Schedule* 369
3. Analysis of Recruitment Interview * 370
4. Teacher Recommendation* 371
5. Sample Introduction Card* 372
6. Summary Sheet/Calendar of Coordination Visits* 373
7. Attendance and Work Report* 374
8. Certification of Youth Participating in a Qualified Cooperative Education Program 375
9. Permission for Release of Confidential Information** 377
10. Consent for Release of Confidential Information** 378
11. Release of Information** 379
12. Cooperative Office Education Application for Admittance. 380
13. Guidance Interview Form 382

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*All of these forms adapted from materials developed by Dr. Elaine F. Uthe as part of a set of materials on cooperative vocational programs developed during a project at Michigan State University. Information about this outstanding project can be obtained by writing Dr. Uthe at 3345 Carriage Lane, Lexington, KY 40502.

**These forms are used by permission of Mott Lincoln High School, Mott, North Dakota 58656.

COORDINATION VISIT REPORT*

SCHEDULE
Date ______
Hour ______
Minutes for Visit ______
Period: 1 2 3 4 5 6
Visit Requested by: Student Supervisor Coordinator

PURPOSE OF VISIT	(check)
Observation of Student at Work	
Visit with Supervisor	
Evaluation for Period	
Problem Situation	
Other: (list)	

SUMMARY COMMENTS: *Record observations made, actions taken and suggestions or tentative plans discussed. Include specific compliments and criticisms if they are made.*

BY STUDENT:

BY JOB SUPERVISOR:

OTHER:

____
TEACHER-COORDINATOR

*UTHE

WEEKLY COORDINATION SCHEDULE*

NAME

WEEK OF

DATE	TIME	COMPANY	PERSON	PHONE

*UTHE

ANALYSIS OF RECRUITMENT INTERVIEW*

STUDENT ______________________________ DATE ____________________

POISE:		At Ease		Composed		Nervous
ATTITUDE:		Cocky		Confident		Cooperative
		Timid		Reserved		
PERSONALITY:		Agressive		Friendly, Warm		Neutral
		Introvert		Unfriendly		
VERBAL EXPRESSION:		Clear		Unclear		
		Good Grammar		Poor Grammar		
INITIATIVE:		Resourceful		Some Initiative		Easy Going

GENERAL COMMENTS: (Maturity, sense of values, intelligence, etc.)

STATED CAREER OBJECTIVE

which is:		realistic
		may not be appropriate
		inappropriate because:

PARENT INTERVIEW

Date ______________ Where ______________________________

Summary: ____

____

____

____
TEACHER-COORDINATOR

---

*UTHE

TEACHER RECOMMENDATION*

Student ______________________________ Subject(s) ______________

This student has applied for participation in the Cooperative Program. Would you help us in our selection process by providing the following information about this student.

	NEEDS HELP	FAIR	AVERAGE	GOOD	EXCELLENT
RELIABILITY					
LEADERSHIP					
INDUSTRIOUSNESS					
POISE					
GROOMING					
KNOWLEDGE OF SUBJECT MATTER					
GETTING ALONG WITH OTHERS					

Any Special Job Skills (a) ______________________________

(indicate level) (b) ______________________________

Special Talents ______________________________

What do you feel are the student's strong points?

What do you feel are the student's weak points?

Other comments:

414

SIGNATURE: ______________________________ DATE: ______________

*UTHE

SAMPLE INTRODUCTION CARD*

(Front of Card)

INTRODUCTION

This will introduce ____________________ who is enrolled in the Cooperative Office Education program at ____________________.
This student is interested in the position of ____________________.
Report to: Firm ____________________ Interviewer ____________________
Address ____________________ Phone ____________________
Appointment Date ____________________ Time ____________________
(SCHOOL NAME)
(SCHOOL ADDRESS)

____
Teacher-Coordinator

Please complete the other side of this card and return to school in the attached, self-addressed envelope.

(Back of Card)

EVALUATION OF ____________________ DURING INTERVIEW:

APPEARANCE	☐ Favorable	☐ Acceptable	☐ Unfavorable
POISE	☐ At Ease	☐ Composed	☐ Nervous
ATTITUDE	☐ Cocky	☐ Cooperative	☐ Reserved
VERBAL EXPRESSION	☐ Clear, Logical	☐ Unclear	☐ Poor Grammar

☐ Will accept for employment: ☐ Summer ☐ Fall

☐ Will not accept for employment. Reasons: ____________________
____

Date ____________ Signature ____________________
Things student can do to make a more favorable impression during future interviews. ____________________
____
____

---

*UTHE

*UTHE

SUMMARY SHEET
CALENDAR OF COORDINATION VISITS*

Period __________ 19 ___ - 19 ___ Coordinator ______________________________

Purposes of Visit: #1 ____________________ #2 ____________________ #3 ____________________

NAME OF STUDENT	VISIT # 1		VISIT # 2		VISIT # 3		PROBLEM VISITS (See Special Reports)			EVALUATION VISIT	
	Date	Comments	Date	Comments	Date	Comments	Date #1	Date #2	Date #3	Date	Comments
1											
2											
3											
4											
5											
6											
7											
8											
9											
10											
11											
12											
13											
14											

ATTENDANCE AND WORK REPORT *

NAME ____________________ DATES: From __________ To __________

FIRM ____

	S	M	T	W	T	F	S
SCHEDULED WORKING TIME FROM: TO:							
LIST ROUTINE TASKS							
LIST NEW TASKS							
TOTAL HOURS WORKED DAILY							

Total hours worked this period: __________ Rate per hour: __________

Gross amount earned for period: ____________________

I verify that this is an accurate statement of the hours worked:

Training Supervisor: ____________________ Date: ____________________

Describe in a paragraph some event that happened this week that made you feel good.

Describe in a paragraph some event with which you had a problem or that made you feel uncomfortable.

List in exact words any criticisms or compliments you received this week.

*UTHE

Form **6199**
(March 1979)
Department of the Treasury
Internal Revenue Service

Certification of Youth Participating in a Qualified Cooperative Education Program

For Purposes of the Targeted Jobs Credit Under Section 44B of the Internal Revenue Code

Certification initiated by (check one)

☐ Employer ☐ Student ☐ School

Part I Qualified School Offering Cooperative Education Program

Name of school NAME OF SCHOOL STUDENT IS ATTENDING THAT IS COORDINATING THE COOPERATIVE ED PROGRAM

Telephone number PHONE # OF SCHOOL

Address (Number and street) ADDRESS OF THE ABOVE MENTIONED SCHOOL

City, State, and ZIP code CITY, STATE, ZIP OF THE ABOVE MENTIONED SCHOOL

School system (IF DIFFERENT FROM ABOVE)

Part II Employer

Name of business NAME OF BUSINESS STUDENT WILL BE EMPLOYED AT

Employer identification number (IRS NUMBER)

Address (Number and street) ADDRESS OF THE ABOVE BUSINESS

City, State, and ZIP code CITY, STATE, ZIP OF THE ABOVE BUSINESS

Employer representative OWNER OR PERSON DOING HIRING

Title TITLE OF OWNER OR PERSON DOING HIRING

Telephone number OF PERSON DOING HIRING

Part III Student *(Targeted Group E—See Instruction C)*

Name NAME OF STUDENT

Date of birth (month, day, year) OF STUDENT

Social security number OF STUDENT

Address (Number and street) ADDRESS OF STUDENT

City, State, and ZIP code CITY, STATE, ZIP OF STUDENT

Date employed or will be employed ACTUAL DATE EMPLOYMENT BEGINS

Starting wage per hour ACTUAL WAGE PER HOUR

Duration of cooperative program of the student BEGINNING DATE AND ENDING
From (date) to DATE OF PROGRAM

Number of hours per week STUDENT IS ACTUALLY WORKING

Part IV Certification by School *(See Instruction B for Definitions)*

I hereby certify that the student named in Part III is a "youth participating in a qualified cooperative education program;" the school named in Part I is a "qualified school;" and the cooperative education program of the school in which the named student is enrolled is a "qualified cooperative education program."

Name of certifying officer (type or print) SCHOOL OFFICIAL OR TEACHER COORDINATOR

Title OF SCHOOL OFFICIAL OR TEACHER COORDINATOR

Signature ▶ SIGNATURE OF SCHOOL OFFICIAL OR TEACHER COORDINATOR

Date ACTUAL DATE

Part V Signature of Employer *(See Instruction A)*

TO BE COMPLETED BY THE EMPLOYER

I hereby certify that the above information is correct and true to the best of my knowledge. This form is for the purpose of obtaining the benefits of the Targeted Jobs Tax Credit under section 44B of the Internal Revenue Code. I understand that my credit for employing the student named in Part III will cease upon notification of any subsequent invalidation of this certification.

Signature ▶

Date

283-463-2

Form **6199** (3-79)

Instructions

A. Purpose of Form 6199

For an individual to qualify as a youth participating in a qualified cooperative education program (as defined in B below), the individual must be certified in writing by a qualified school as meeting the conditions specified in B(1) below. The school may satisfy the certification requirement by completing Form 6199. The certification allows the employer named in Part II of Form 6199 to claim the targeted jobs credit for qualified wages paid or incurred after December 31, 1978, to the student named in Part III of the form.

Parts I through IV of Form 6199 are prepared in triplicate by the school. The original of the form is given to the employer. The school also gives one copy of the form to the Central State Employment Security Agency for the state in which the school is located and the remaining copy is retained by the school for its records.

When the employer receives the form from the school, the employer must sign Part V certifying that the information on the form is correct before the targeted jobs credit can be claimed for wages paid to the student named on the form. Form 6199 must be kept by the employer for tax purposes.

B. Definitions

(1) Youth Participating in a Qualified Cooperative Education Program.—In general, the term "youth participating in a qualified cooperative education program" means any individual who is certified in writing by the school participating in the program as meeting the following conditions:

(i) having attained age 16 and not having attained age 19,

(ii) not having graduated from a high school or vocational school, and

(iii) being enrolled in and actively pursuing a qualified cooperative education program.

(2) Qualified School.—The term "qualified school" means:

(i) a specialized high school used exclusively or principally for the provision of vocational education to individuals who are available for study in preparation for entering the labor market,

(ii) the department of a high school used exclusively or principally for providing vocational education to persons who are available for study in preparation for entering the labor market, or

(iii) a technical or vocational school used exclusively or principally for the provision of vocational education to persons who have completed or left high school and who are available for study in preparation for entering the labor market.

A school which is not a public school shall be treated as a qualified school only if it is exempt from tax under section 501(a) of the Internal Revenue Code.

(3) Qualified Cooperative Education Program.—For purposes of section 51(d)(8)(B) of the Internal Revenue Code relating to the definition of a "qualified cooperative education program," the term "program of vocational education" means an organized educational program which is directly related to the preparation of individuals for employment, or for additional preparation for a career requiring other than a baccalaureate or advanced degree. An "organized education program" means only instruction related to the occupation or occupations for which the students are in training.

C. Instructions for Employer

For tax years ending after December 31, 1978, the qualified first year wages or qualified second year wages paid to the employee(s) certified as a youth(s) participating in a qualified cooperative education program are to be entered on the "Targeted Group E" line(s) of the appropriate Form 5884–FY, Jobs Credit, or Form 5884, Jobs Credit.

U.S. GOVERNMENT PRINTING OFFICE 443—283—463

283—463—1

PERMISSION FOR RELEASE OF CONFIDENTIAL INFORMATION
MOTT LINCOLN HIGH SCHOOL
MOTT DIST. #6
Mott, North Dakota

The undersigned do hereby authorize Mott Lincoln High School/Mott Public School, to release information from the school records, including complete transcripts, test data, class rank, recommendations, attendance and anything else requested by:

____

____
Student's Name

____
Student's Signature

____
Parent's or Guardian's signature
(if under 18 years of age)

____
Date

Mott Lincoln High School
Mott, North Dakota 58646

TO THE PARENTS OF ____

I hereby give my consent for release of all school related records accumulated at:

Name and address of school last attended ________________________________

Records to be released and sent to:

Theodore V. Binstock, Principal
Mott Lincoln High School
Mott, North Dakota 58646

____
Signature of Parent or Guardian

RELEASE OF INFORMATION

To the Parents of ____

I hereby give my consent for Mott School Dist. #6 to ______________

____

____

To ____

____

For the purpose of ____

____

____

____
Parent's Signature

____
Date

COOPERATIVE OFFICE EDUCATION*
Application for Admittance

NAME: ______________________________ ______________

AGE: ____ DATE OF BIRTH: ____________ HEIGHT: _____ WEIGHT: ___________

ADDRESS: _________________________________ TELEPHONE NO: _____________

DRIVERS LICENSE? ____ ACCESS TO A CAR? ____ INTERESTED IN SUMMER JOB? ___

PARENT OR GUARDIAN NAME: __________________ OCCUPATION: ______________

PARENT OR GUARDIAN ADDRESS: ____

INDICATE THE TYPE OF OFFICE IN WHICH YOU PREFER TO WORK. List choices. *(Bank, Dental, Department Store, Legal, Manufacturing, Business, Medical, School, etc.)*

First Choice: _______________________ Second Choice: _________________

REASON FOR ABOVE PREFERENCE:

Do you attend school regularly? ____ *Absences to date (this year)* _______

Major reason for absences: _______________________________________

Are you under a doctor's care? _____ *Do you have any health problems which would interfere with your regular attendance on a job?* ____ *If so, please explain:* ____

Have you ever worked full or part-time? ____ *Where?* ___________________

Type of Job: ____

Are you currently employed? ____ *If yes, where?* ______________________

____

Do you intend to further your formal education after high school? _______

Type your present schedule of classes on the back of this form.

APPLICATION FOR ADMITTANCE CONTINUED

PLEASE ATTACH A PERSONAL DATA SHEET. Include as references names of three teachers who can attest to the quality of your work.

TO THE STUDENT:

Cooperative Office Education provides an opportunity to be considered for employment in the offices of businesses and industries in our area. When you enroll in COE, you indicate that you are sincerely interested in putting forth your best efforts to receive on-the-job training. If you accept this responsibility, please sign in the space provided:

____
Student-Learner

TO THE PARENT OR GUARDIAN:

Do you consent to your daughter or son entering the Cooperative Office Education Program and do you agree to cooperate with the school and the training agency in making the training and education of the greatest possible benefit to your daughter or son? If so, please indicate your support and approval with your signature.

____________________ ______________________________
Date Parent or Guardian

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*Dept. of Education, A Competency-Based Guide for Organizing and Administering Cooperative Office Education, Richmond, VA, (June, 1979), p. 4.5

GUIDANCE INTERVIEW FORM*

PERSONAL REVIEW OF ____ DATE __________

1. Aptitude-Achievement-Career Interest Tests show:

ABILITY LEVEL

	Below Average	Average	Above Average
Verbal Abilities			
Computative (Math)			
Clerical			
Reading			

2. Best grades have been in: ________________________________

3. Overall grade average in business courses is: ____________________

4. Strongest course in business is: ____________________________

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Signature-Guidance Counselor

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*Dept. of Education, A Competency-Based Guide for Organizing and Administering Cooperative Office Education, Richmond, VA, (June, 1979), p. 4.3

APPENDIX D

DESCRIPTION OF THE GENERAL APTITUDE TEST BATTERY PAGE

1. Description of GATB 383
2. GATB Uses in Grades Nine and Ten 384
3. Individual Testing 385
4. Individual Counseling and Placement 385

DESCRIPTION OF THE GENERAL APTITUDE TEST BATTERY

The use of the General Aptitude Test Battery (GATB) has value to those students in the vocational office education program. The information below is presented for the office education coordinator to become better acquainted with this instrument.

DESCRIPTION OF GATB:

The GATB edition being released to secondary schools is B-1002B. It consists of 12 tests, including seven paper-and-pencil tests for which National Computer Systems answer sheets are provided, one paper-and pencil motor coordination test, which is not machine scorable, two apparatus tests using the USES Pegboard, and two apparatus tests using the USES Finger Dexterity Board. Approximately two and one-half hours are required to administer the GATB B-1002B. The paper-and-pencil tests should be administered to groups of not more than ten by one examiner. The apparatus boards should be administered to groups of not more than five by one examiner. One assistant should be available for each additional ten (paper-and-pencil) and five (apparatus boards) persons tested.

The 12 tests in the GATB measure nine aptitudes. The names and definitions given to these nine aptitudes are as follows:

G. INTELLIGENCE: General learning ability. The ability to "catch on" or understand instructions and underlying principles; the ability to reason and make judgments. Closely related to doing well in school.

V. VERBAL APTITUDE: The ability to understand meaning of words and to use them effectively. The ability to comprehend language, to understand relationships between words and to understand meanings of whole sentences and paragraphs.

N. NUMERICAL APTITUDE: Ability to perform arithmetic operations quickly and accurately.

S. SPATIAL APTITUDE: Ability to think visually of geometric forms and to comprehend the two-dimensional representation of three-dimensional objects. The ability to recognize the relationships resulting from the movement of objects in space.

P. FORM PERCEPTION: Ability to perceive pertinent detail in objects or in pictorial or graphic material. Ability to make visual comparisons and discriminations and see slight differences in shapes and shadings of figures and widths and lengths of lines.

Q. CLERICAL PERCEPTION: Ability to perceive pertinent detail in verbal or tabular material. Ability to observe differences in copy, to proofread words and numbers, and to avoid perceptual errors in arithmetic computation.

K. MOTOR COORDINATION: Ability to coordinate eyes and hands or fingers rapidly and accurately in making precise movements with speed. Ability to make a movement response accurately and swiftly.

F. FINGER DEXTERITY: Ability to move the fingers and manipulate small objects with fingers, rapidly or accurately.

M. MANUAL DEXTERITY: Ability to move the hands easily and skillfully. Ability to work with the hands in placing and turning motions.

GATB USES IN GRADES NINE AND TEN:

The Job Service Offices utilize the GATB for purposes of selecting persons who can be referred to employers as candidates to fill specific job orders. The specific Aptitude Test Batteries have specific cut-off scores which can be used as a basis for recommending or not recommending a person as a test-selected candidate. School counselors need not, indeed cannot, use the GATB with ninth and tenth grade students in the same manner. School counselors are to use the GATB for counseling purposes only.

The following are some possible ways in which school counselors might use the GATB in grades nine and ten:

1. The scores made on each of the GATB aptitudes can be interpreted to individual students in a counseling interview. This interpretation can assist the student to grow in self-understanding if encourages to evaluate the scores in relation to other information known about himself/herself and personal achievements.

2. Counselors can assist students to identify particular aptitude scores which are high. Some students may have special skills which cannot be easily discovered by the regular academic-type tests. Possible vocational implications of these special skills may be discussed with the students. This may provide a basis for counseling in a positive, rather than a negative, manner.

3. The Occupational Aptitude patterns can provide a basis for helping students to learn the test-measured aptitudes which have been objectively and subjectively identified with occupational fields of work. Depending on the reasons for testing the student in the first place, the student may wish to discuss the aptitudes considered important for certain occupations of interest, or the student may wish to reverse this process by first identifying measured aptitudes and then exploring the occupational fields related to these measurements.

4. The G, V, and N scores on the GATB can be used as measures of scholastic aptitudes. These measures compare favorably with other tests of school learning ability.

5. The GATB may be used as a means to motivate vocational planning or study on the part of individual students or group guidance classes. The test may provide a means to initiate exploration of occupations. The occupations listed in the GATB materials are coded according to the Dictionary of Occupational Titles. These lists can be of assistance in making use of informational materials coded in a similar fashion.

6. The GATB offers some possible help in identifying student skills, in addition to academic skills, which may be related to learning potential in secondary school vocational educational programs. Additional research in this area is needed.

The GATB is available, through a release agreement with Job Service, to high school employing counselors or guidance designates. If the guidance counselor in your school has had training on administering the GATB test, he/she can administer this test to your students.

Individual Testing

Any student individually may wish to make arrangements with the local Job Service Office for testing. Tests available are aptitude, interest, spelling, shorthand, and typing. The Job Service N. Dak. in cooperation with the North Dakota Central Personnel Division has developed a procedure for testing applicants in the clerical fields who are interested in and qualified for positions in Merit System Agencies.

Individual Counseling and Placement

High school students like other adults will be interviewed and placed in the active file of candidates for employment. They will be interviewed as to their abilities and future plans. This counseling and placement service will be done on an individual basis.

DEFINITION OF TERMS

ADVISORY COMMITTEE A group of persons, usually from outside the field of education, selected because of their knowledge and expertise in certain areas to advise educators regarding vocational programs. Such committees can operate at the Federal, State, and Local levels and often function under names other than advisory committee.

BUSINESS EDUCATION A program to provide students with information and competencies which are needed by all in managing personal business affairs and in using the services of the business world.

COMPETENCY The knowledge, skill and/or attitude needed for the student-learner to perform successfully on the job.

COOPERATIVE OFFICE EDUCATION A program of vocational education for persons who, through a cooperative arrangement between the school and employers, receive instruction. including required academic courses and related vocational instruction by the alternation of study in school with a job in any occupational field, but these two experiences must be planned and supervised by the school and employers so that each contributes to the student's education and to his employability. Work periods and school attendance may be on alternate half-days, full days, weeks, or other periods of time in fulfilling the cooperative vocational education work-study program.

COOPERATIVE PLAN Organizational pattern for preparatory instruction which involves regularly scheduled part-time employment that gives students an opportunity to experience theory in practice while developing competencies through supervised training on a job related to their occupational objective.

COORDINATION The process of integrating into a harmonious relationship the administrative, organizational and instructional activities of the vocational program and directing them toward a common purpose.

COORDINATOR (COOPERATIVE EDUCATION) A member of the school staff responsible for administering the school program and resolving all problems that arise between the school regulations and the on-the-job activities of the employed student. The coordinator acts as liaison between the school and employers in programs of cooperative education or other part-time job training.

COUNSELOR, GUIDANCE An experienced and trained person who helps another individual to understand himself and his opportunities, to make appropriate adjustments, decisions, and choices in the light of his unique characteristics, and to initiate a course of training or work in harmony with his selection.

EVALUATION FORM A form used by the teacher/coordinator and training supervisor to assess the student-learner's progress in becoming a competent employee.

FOLLOW-UP, VOCATIONAL A survey to determine what occupations the students and graduates of vocational education courses not only enter but pursue over a span of time, and how effective their training was in relationship to actual needs of the job.

FBLA The local, state and national student organization which is an important part of the total office education program.

GUIDANCE SERVICE Those activities which have as their purpose: Helping pupils assess and understand their abilities, aptitudes, interests, environmental factors, and educational needs; assisting pupils in increasing their understandings of educational and career opportunities; and, aiding pupils in making optimum use of educational and career opportunities through the formulation of realistic goals. These activities include counseling pupils and parents, evaluating the abilities of pupils, assisting pupils in personal and social adjustment, and working with other staff members in planning and conducting guidance programs.

GUIDANCE, VOCATIONAL The process of assisting individuals to understand their capabilities and interests, to choose a suitable vocation, and to prepare for, enter, and make successful progress in it.

JOB DESCRIPTION A systematic listing of the tasks and duties in a job with the knowledge, relationship with others, physical and working conditions, and other factors associated with it.

LABORATORY (VOCATIONAL) Refers to the in-school or out-of-school arrangements of space, equipment, and facilities appropriate for the application of principles supportive of instruction and concentrating on practices, enabling the student to develop competencies related to entering, advancing or changing employment in a given occupation or cluster of occupations.

OCCUPATIONAL OBJECTIVE A specific recognized occupational goal, selected by the student, the attainment of which is the purpose for his vocational instruction.

OFFICE OCCUPATIONS Those activities performed by individuals in public and/or private enterprise - which are related to the facilitating function of the office. They include such items as recording and retreval of data, supervision and coordination of office activities, communication, and reporting of information regardless of the social, economic, or governmental organizations in which they are found.

ON-THE-JOB TRAINING Instruction in the performance of a specific job given to an employed worker by the employer during the usual working hours of the occupation. Usually the minimum or beginning wage is paid.

POST SECONDARY EDUCATION Instruction at the 13th and 14th grade levels provided in community colleges, area vocational schools, junior colleges, technical institutes, vocational and adult schools, or divisions of four year collegiate institutions.

PROGRAM A planned sequence of courses, services, or other educational activities, designed to meet a specific vocational objective(s).

PROGRAM COMPLETER Means a student who finishes a planned sequence of courses, services or activities, designed to meet an occupational objective and which purports to teach entry-level job skills.

PROGRAM LEAVER Means anyone who has been enrolled and attended a program of vocational education and has left the program or institution without completing the program, including persons who leave the program voluntarily before its formal completion because they have acquired sufficient entry-level occupational preparation to work in the field, and who have taken a job related to their field of training and, all other leavers.

I. Program leaver who completed 50% or more of the program. (50%-100%)
II. Program leaver who completed 49% or less of the program. (0%-49%)

PUBLIC VOCATIONAL SCHOOL A secondary school under public supervision and control and supported by public funds which provides instruction that will enable high school youth and adults to prepare for, enter, and make progress in a skilled trade or occupation of their choice.

SIMULATION The duplication in the classroom of activities found in an actual business office. It is used to pull together the multiple learning experiences of students and to maximize the transfer of training from the classroom to the business office.

STATE BOARD FOR VOCATIONAL EDUCATION The board designated by the State Legislature to cooperate with the U.S. Office of Education in the administration of the State Plan of Vocational Education. Charged with the responsibility of approval, receipt, and distribution of all Federal funds under the Vocational Education Acts. Submits the State Plan and administers the program contained therein. In most states, this board is also the state board of education.

STATE DIRECTOR FOR VOCATIONAL EDUCATION The educational administrator employed by the state board for vocational education to administer the State Plan. The director is a full time administrator with no substantial duties outside the vocational education program. Usually identified by the title "State Director for Vocational Education" or "Assistant Superintendent" or "Assistant for Vocational-Technical Education."

STATE ADVISORY COUNCIL Appointed by the Governor, a group with broad representation from business, labor community, and vocational education administration, which advises the State Board, conducts evaluations, and prepares reports for the National Advisory Council.

STATE PLAN The document submitted by the State Board for Vocational Education to the U.S. Office of Education describing the State's vocational education program. Includes policies followed by the State in maintaining, extending, and improving existing programs and establishing new programs to meet the intent of the Vocational Education Acts. Prerequisite to receiving Federal funds under the acts.

STUDENT-LEARNER A member of a cooperative education program legally employed as a part-time worker and so classified by the Wage and Hour and Public Contracts Divisions of the U.S. Department of Labor for wage and hour regulation purposes.

SURVEY, COMMUNITY A fact-finding study of socio-economic conditions and resources, community agencies, industries, business, farming, institutional practices, problems and practices of families, etc., as they exist at a given_time in a given community. It is used by the school as a guide in revising school offerings to meet local needs.

SURVEY, OCCUPATIONAL A form of occupational census, taken by personnel trained to determine the number of qualified workers in designated occupations in a specific geographic or economic area; and to evaluate the need for increasing or limiting the number available for employment in the occupations surveyed.

TEACHER-COORDINATOR A member of the local school staff who teaches business and office subjects to students preparing for employment and coordinate classroom instruction and laboratory (on-the-job or project) learning activities of career oriented students.

TRAINING AGREEMENT A form prepared by the teacher-coordinator indicating the period of training, hours of work, salary, and other pertinent facts and information necessary to assure basic understanding of the student's position as a student-learner in the cooperative education program; to be signed by coordinator, employer, student, and parents.

TRAINING STATION The business firm at which the student is employed as part of the Cooperative Office Education program.

VOCATIONAL COUNSELING Assistance to individuals in making vocational choices and clarifying vocational goals. It often involves testing and interpretation of aptitudes, interests, personality factors, etc.

VOCATIONAL EDUCATION Vocational or technical training or retraining which is given in schools or classes (including field or laboratory work and remedial or related academic and technical instruction incident thereto) under public supervision and control or under contract with a State Board or local educational agency and is conducted as part of a program designed to prepare individuals for gainful employment as semi-skilled or skilled workers to technicians or sub-professionals in recognized occupations and in new and emerging occupations or to prepare individuals for enrollment in advanced technical education programs, but excluding any program to prepare individuals for employment in occupations. . . generally considered professional or which requires a baccalaureate or higher degree. (As defined in Public Law 90-576).

VOCATIONAL AND TECHNICAL EDUCATION Refers to that training or retraining given in school, field, or laboratory relating instruction of youth and adults to employment of persons or workers, technicians, or paraprofessionals in existing or emerging occupations.

WORK EXPERIENCE (VOCATIONAL) A program having as its purpose the extension of vocational learning opportunities for the student through part-time employment in the occupation for which instruction in school is preparing the student.

WORK STUDY A term with a historic association with cooperative education. Also, it is a program designed to provide financial assistance, through part-time employment, to students who have been accepted for full time enrollment in vocational training education programs so that they may continue in vocational training. The part-time employment is based on the financial need of the student and is not necessarily related to career objectives.

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